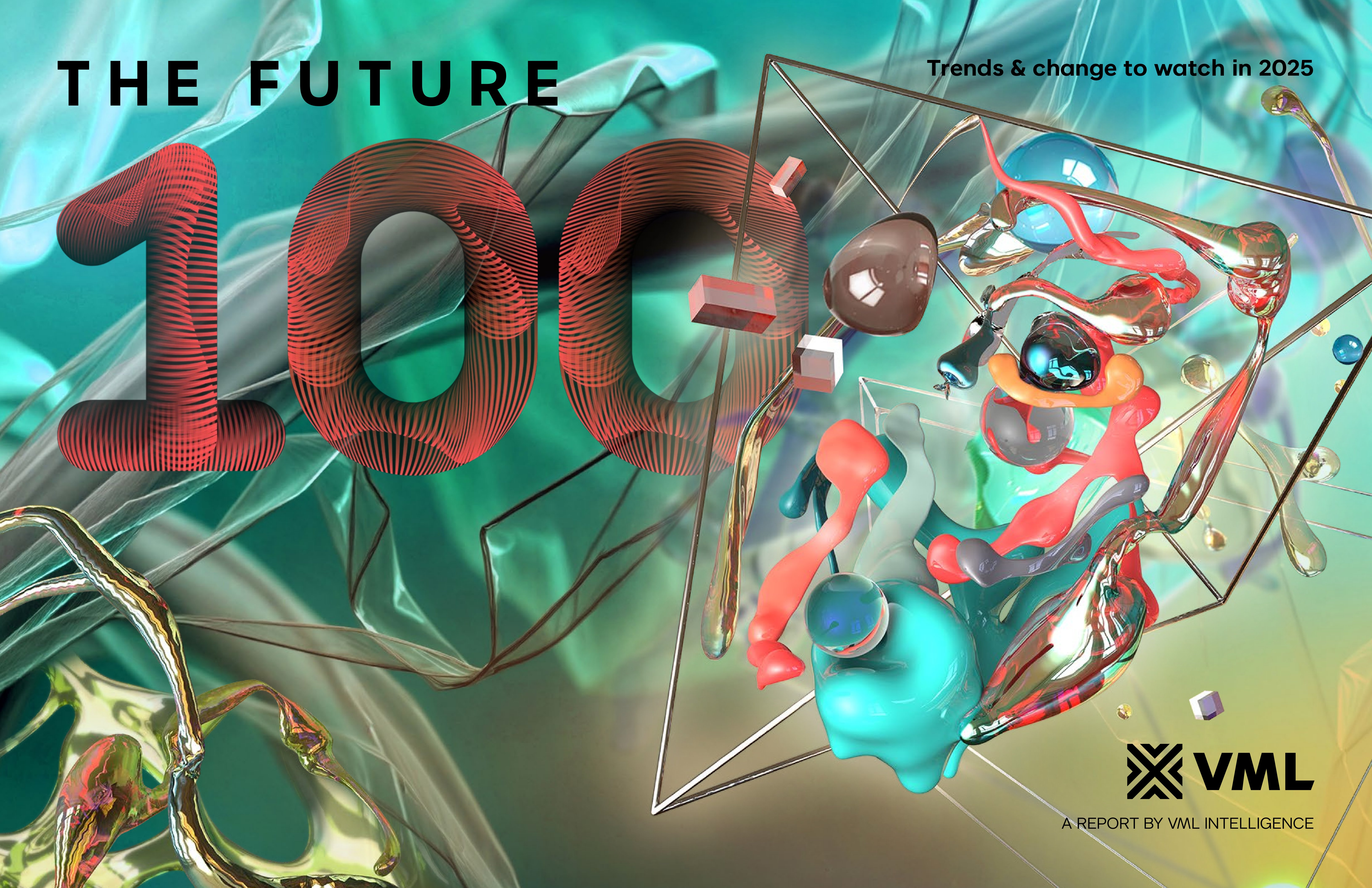

THE FUTURE

100

Trends & change to watch in 2025

VML

A REPORT BY VML INTELLIGENCE

FOREWORD

Realities collide in the pursuit of meaning. The 11th edition of "The Future 100" ushers in a year of possibilities.

New realities are being made—by technology and our imaginations. More than escapism, this is helping to ground a world grappling with polarization, distortion, and uncertainty. Faced with unsettling issues, people are creating a soothing reality that makes sense to them—one that is imaginative and optimistic (Reality shift, page 16), where cocktails levitate (Reality-defying dining, page 127), and people can live for an eternity (Digital immortality, page 244). Anything imagined can be realized (World-conjuring tech, page 254).

Human potential is also being redefined. Tech-powered garments are supercharging performance for Augmented humans (page 240). Research is unlocking ways to extend lifespans, from seeking Longlife careers (page 223) to Disrupting the menopause (page 246) and the promise of Skinjuvenation (page 262). Technology is even helping us transcend the constraints of the body, as lives are uploaded and loved ones who have passed live on (Grief tech, page 67).

A new creativity economy is emerging, propelled by mainstream adoption of artificial intelligence (AI). In a world where everyone can be a creator, this is powering innovation, while also provoking unease. AI-generated creative output is seeing a backlash, and 76% of people believe that technology will never take creativity away from humanity. People cherish creativity that's Made by humans (page 115), while acknowledging that tech is a powerful collaborator: 65% of people agree that AI tools will allow us to be more creative and progressive in imagining the future of beauty, for example (Algorithmic beauty, page 145).

Last year, seeking respite from a fast-paced world, people strived to find space to think more purposefully about their lives. That desire has evolved into a quest for self-knowledge and discovery that is evident in a yearning for tactile activities (The analog movement, page 36), for finding connection through self-acceptance (Destination solitude, page 73), and renewed focus on the intuitive self, previously muffled by digital noise (Somatic wellness, page 221).

Brands must rethink messaging, balancing resonance with restraint (Humble branding, page 111). In financially challenging times, brands must be accessible (Prudent pricing, page 172), while offering indulgence (Affordable affluence, page 214).

Get ready for a paradoxical year where the surreal gets real, advanced technology meets digital disconnection, and the dawn of the trillionaire collides with cost-cutting. This is "The Future 100: 2025" preparing you for the year ahead.

Emma Chiu and Marie Stafford
Global Directors, VML Intelligence
vml.com/expertise/intelligence

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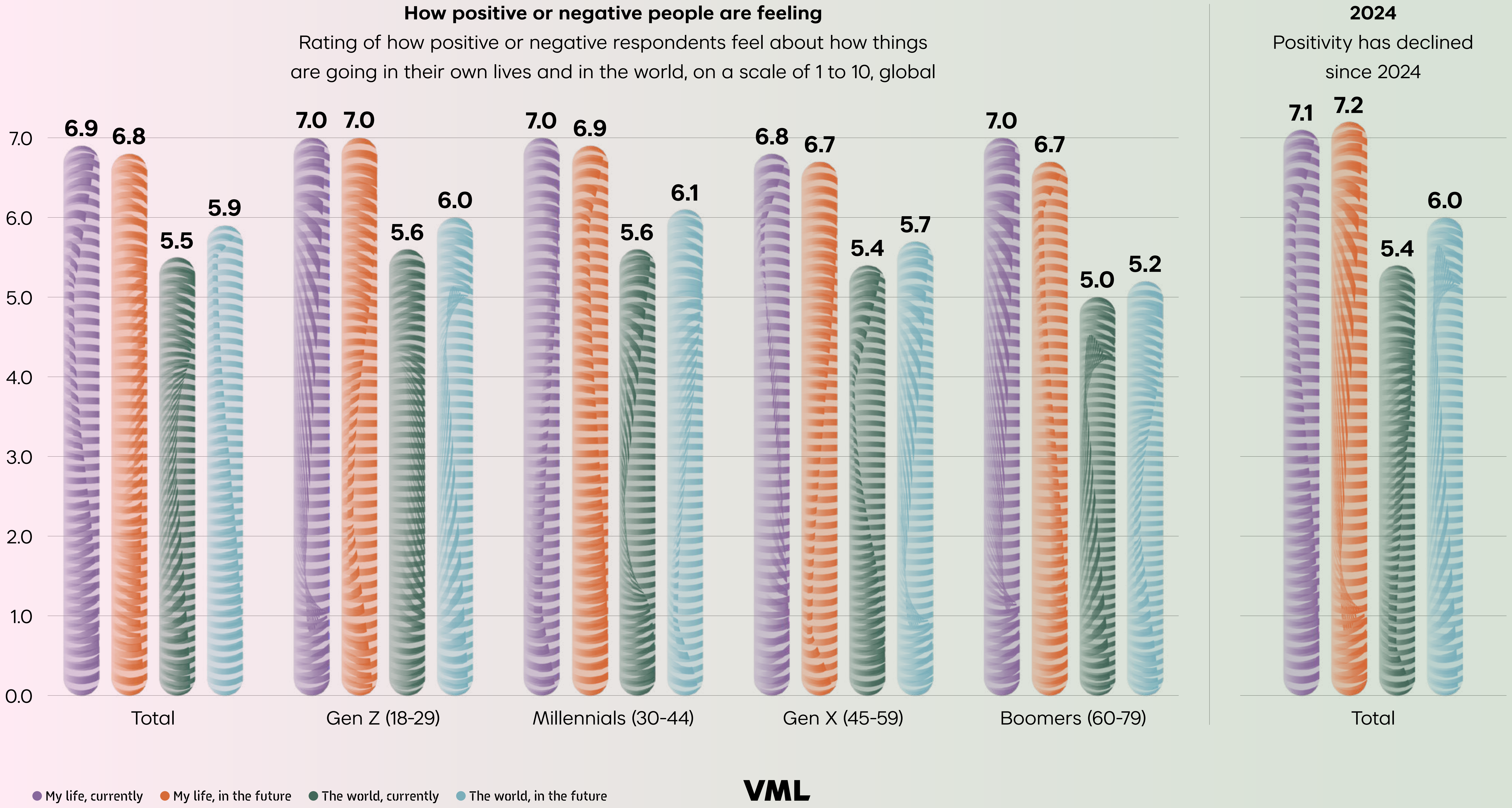
BY THE NUMBERS

2025 is set to present a year of paradoxes and oppositions, where brands will need to get comfortable with complexity and meeting needs that are seemingly opposed.

Unless otherwise stated, all findings in this report were collected by SONAR™, VML's research practice, from September to November 2024. 13,961 18+ adult respondents were surveyed in Argentina, Australia, Brazil, China, Colombia, France, India, Japan, Mexico, South Africa, Thailand, the United Arab Emirates, the United Kingdom, and the United States. For methodology see page 271.

OPTIMISM IS FRAGILE, TEMPERED BY GLOBAL REALITIES



How positive or negative people are feeling

Rating of how positive or negative respondents feel about how things are going in their own lives and in the world, on a scale of 1 to 10, global

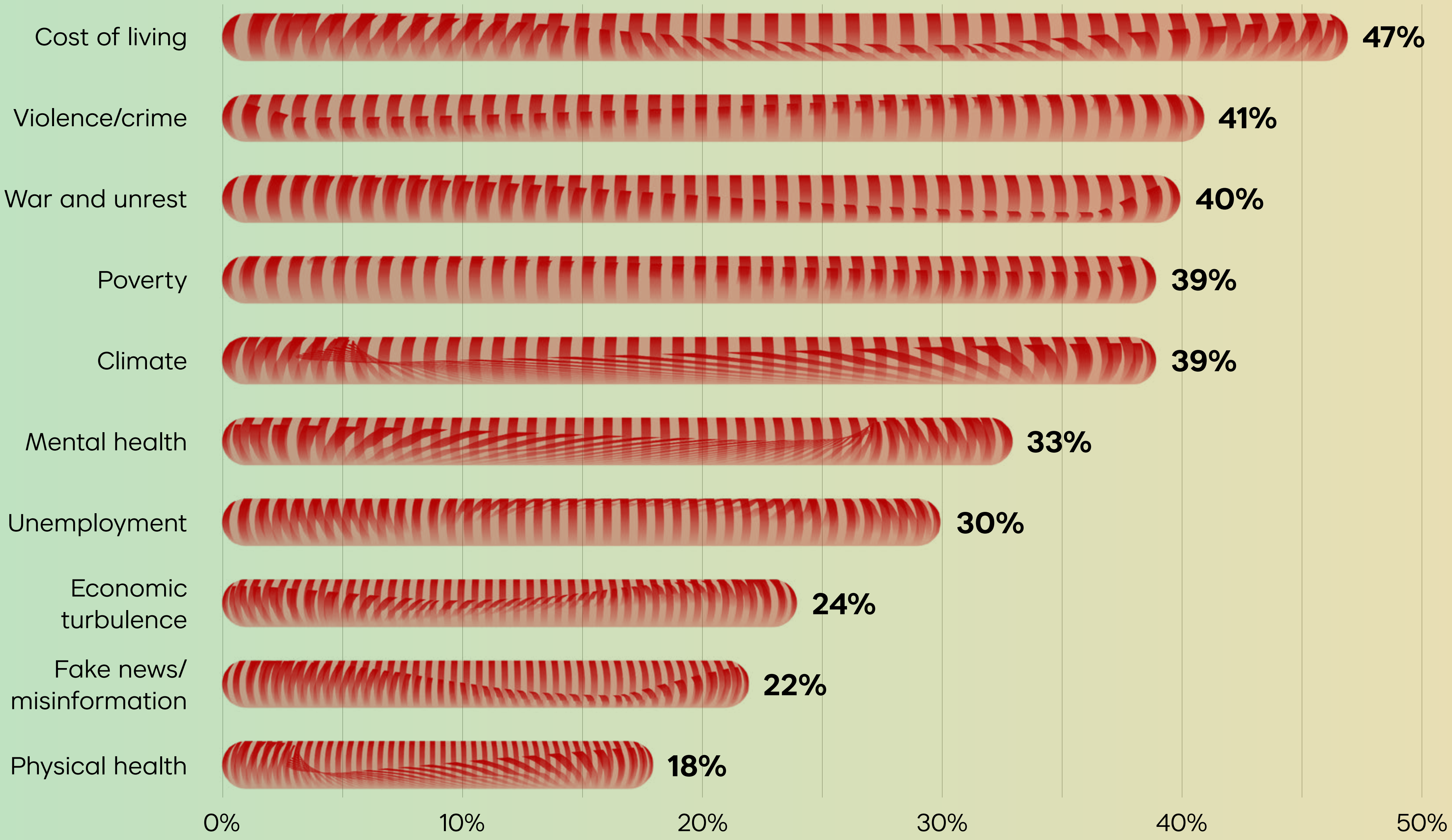
2024

Positivity has declined since 2024

IN THE METACRISIS, ANXIETIES ON MONEY, SECURITY, AND CLIMATE WEIGH HEAVY

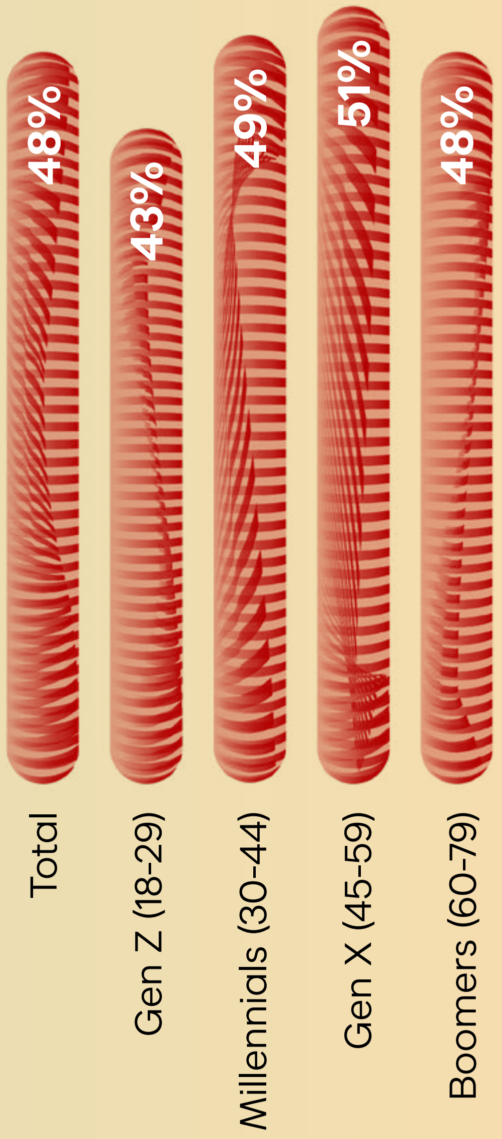
The top 10 most pressing issues facing society

Percentage selecting in their top five, global



#1 challenge for human health

STRESS

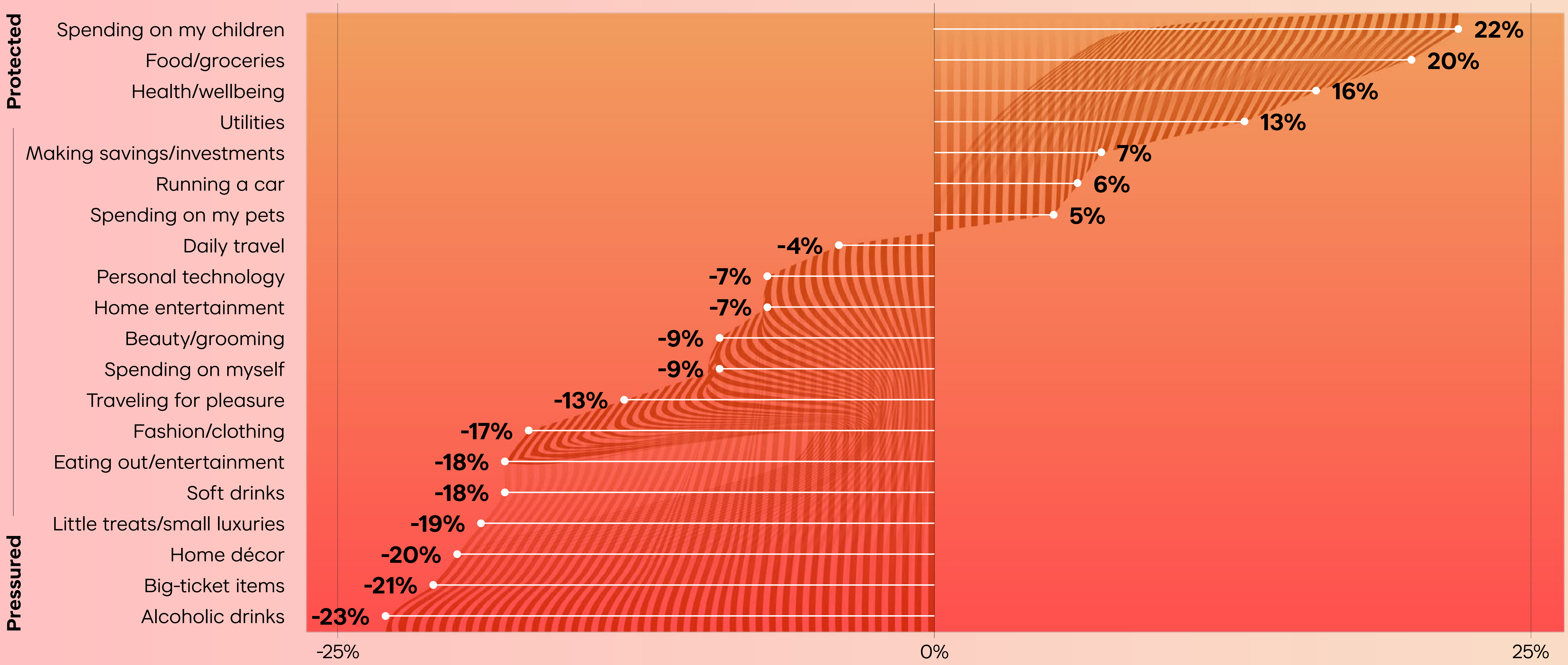


By generation

CONSUMERS PRIORITIZE ESSENTIAL SPENDING. HEALTH IS A KEY EXCEPTION

Net consumer spending by category

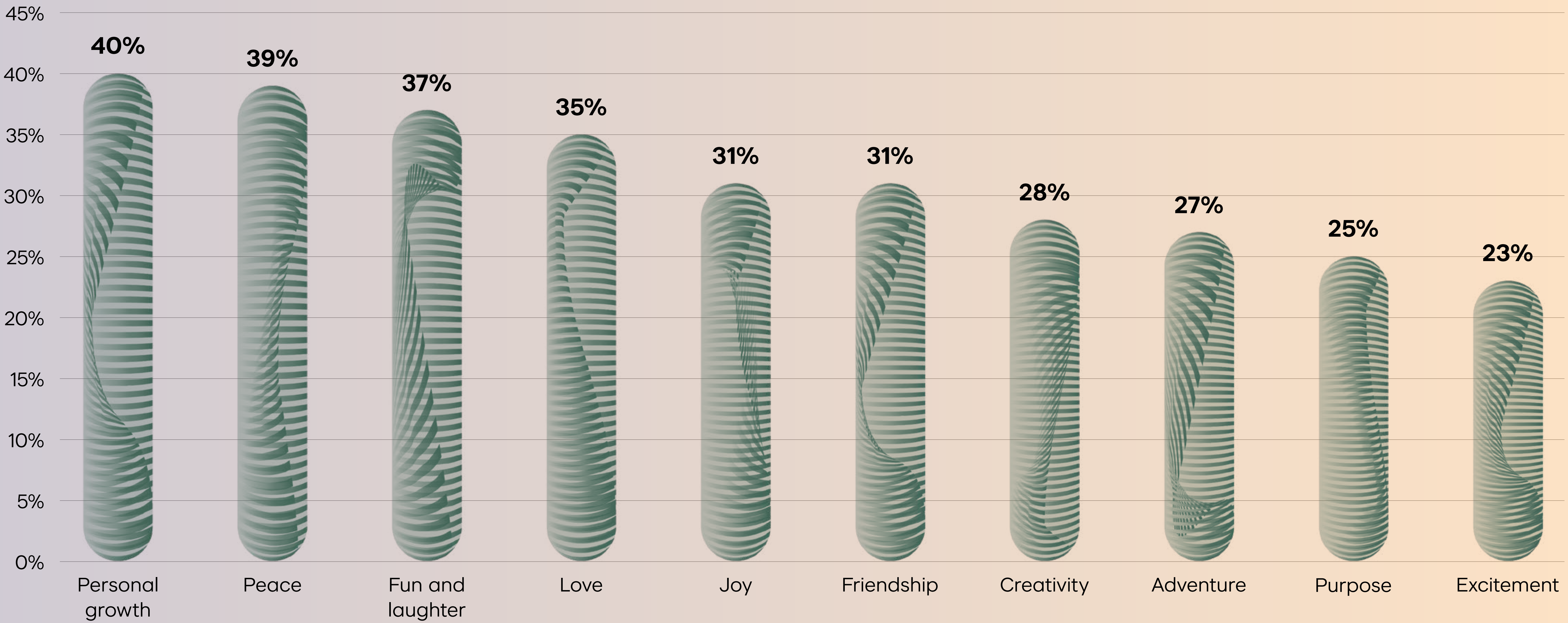
Percent spending much or somewhat more, less percent cutting back somewhat or greatly, global



PEOPLE ARE SEEKING GROWTH AND FULFILLMENT

Feelings and experiences

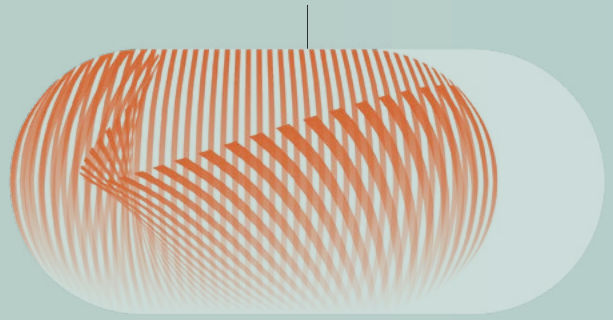
Which of the following would you like to have more of in your life? Percent selecting, global



BRANDS GET COMFORTABLE WITH CONTRADICTIONS

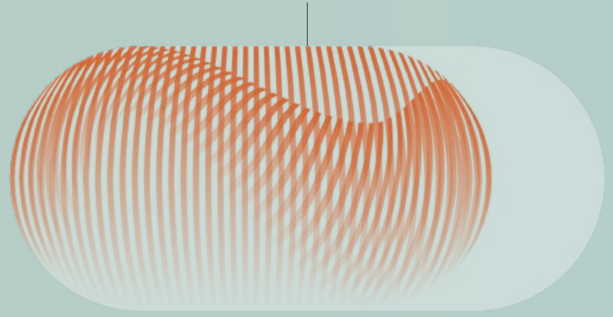
People want brands to be honest and down to earth…

82%



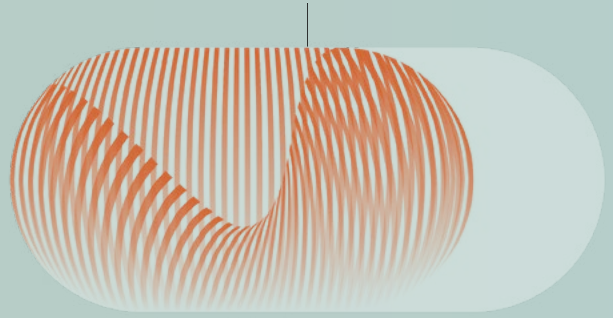
I prefer advertising that is humble, that doesn't make grandiose claims

81%



I like advertising that gives me a laugh, that doesn't take itself too seriously

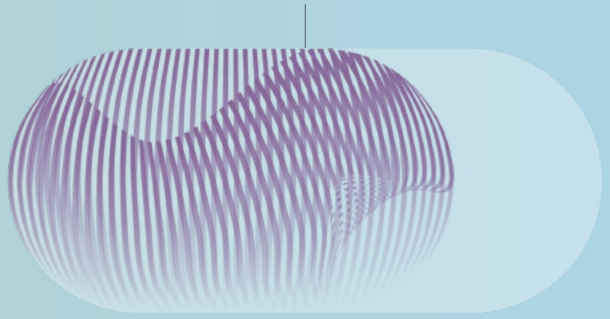
78%



Brands should make more effort to speak well to people like me

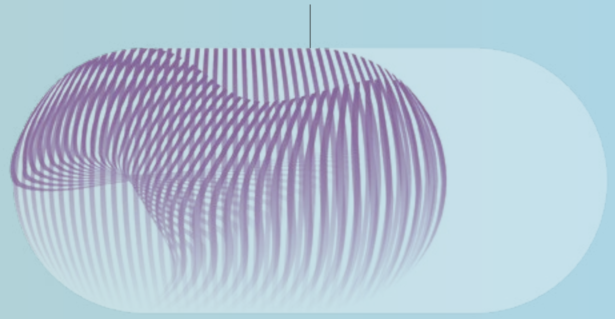
…but also put on a show, and keep them entertained

75%



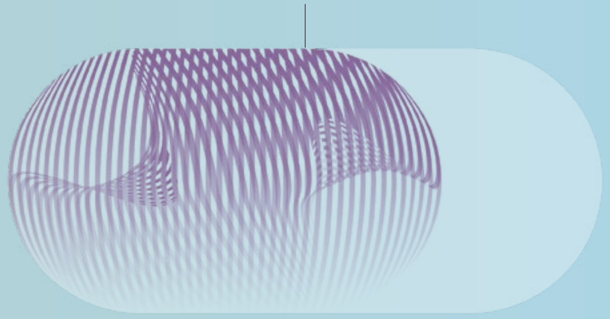
Brands should make more effort to be entertaining

73%



Brands should make more of an effort to "wow" me with their marketing

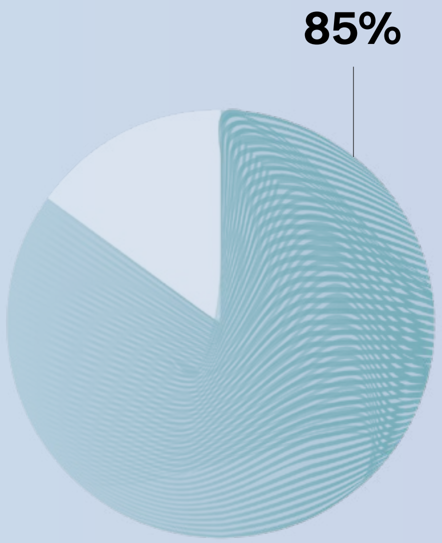
73%



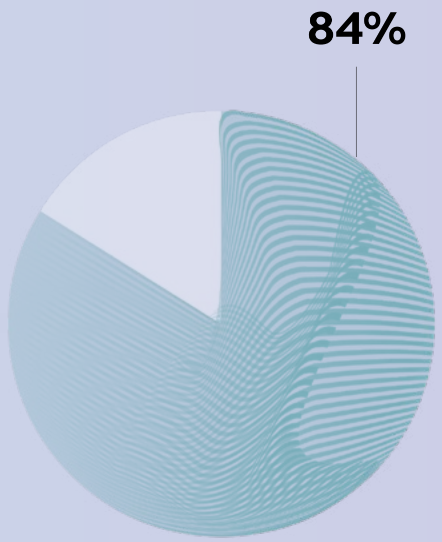
Brands should aim to engage all of my senses

Percent who somewhat/strongly agree with each statement, global

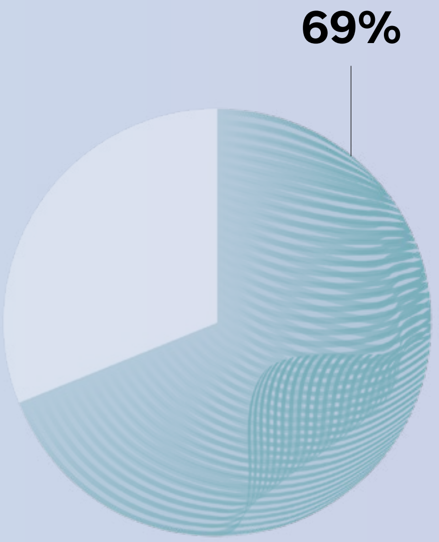
AGAINST A BACKDROP OF CHAOS AND CHANGE, PEOPLE ARE YEARNING TO RECONNECT WITH THEIR INTUITIVE SELVES



I wish I had more time to spend with the people I care about

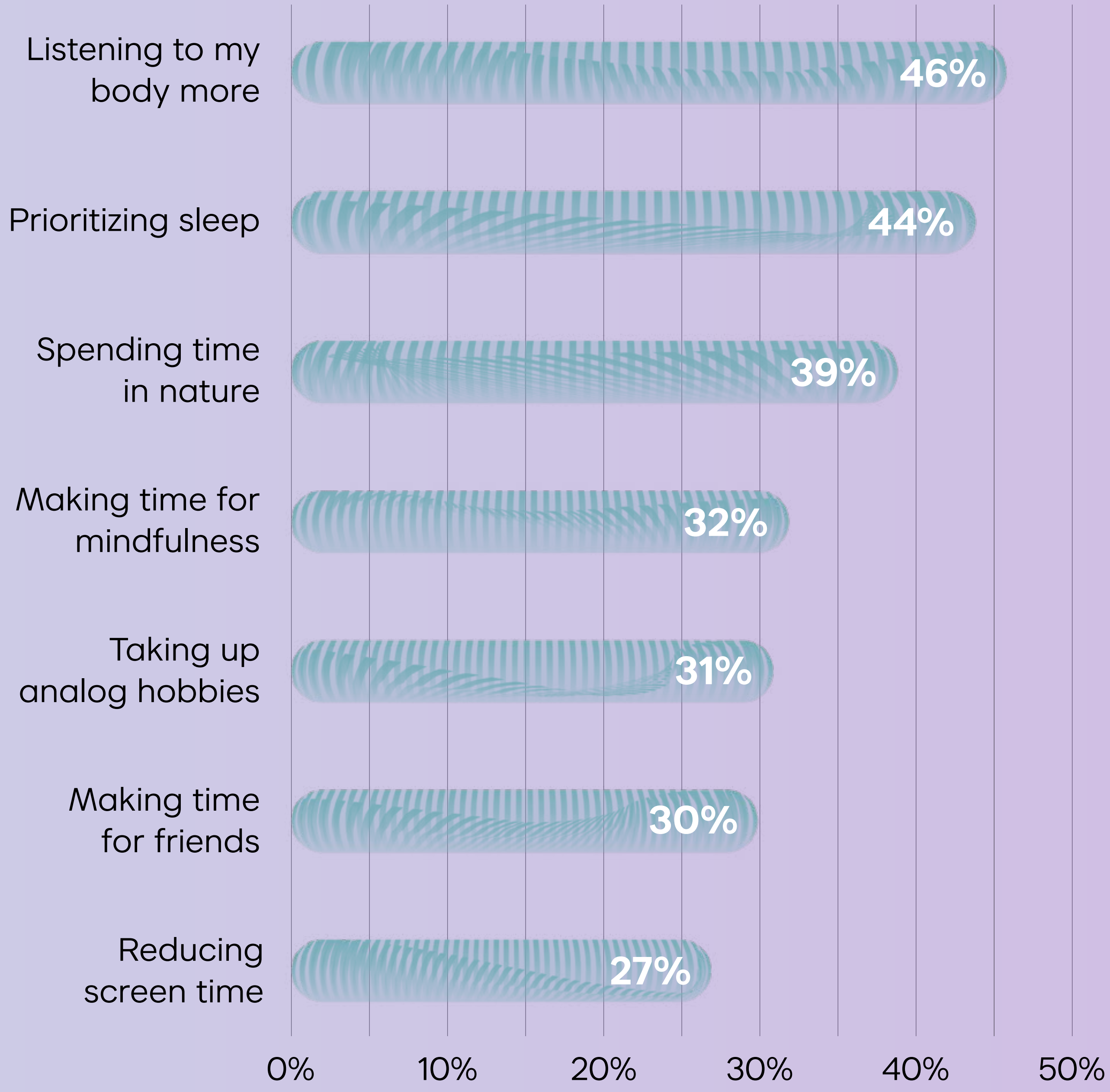


People are less present these days because of increased technology



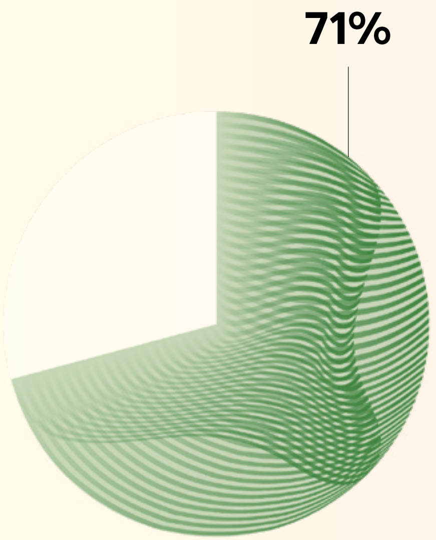
I am actively looking to buy or own less stuff as a lifestyle choice

Behaviors doing more of compared to last year, percent, global

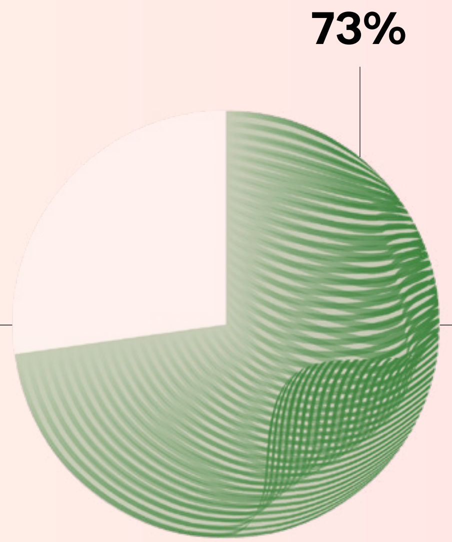


Percent who somewhat/strongly agree with each statement, global

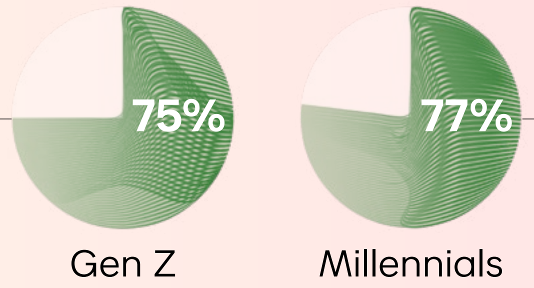
THE VERY BOUNDARIES OF WHAT IT MEANS TO BE HUMAN ARE SHIFTING

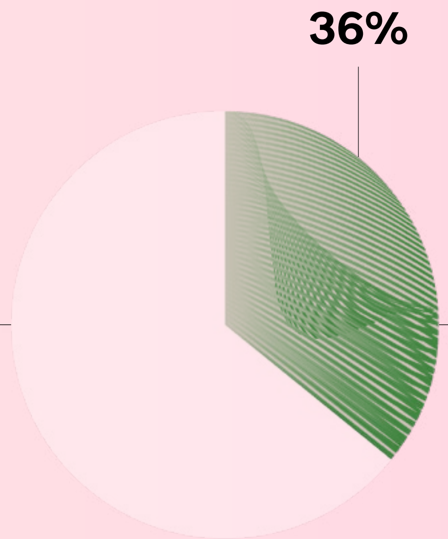


In the future, the line between what is human and what is technology will blur

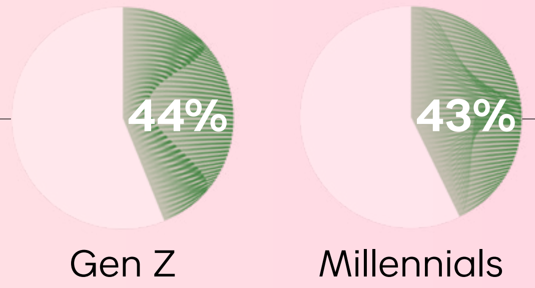


I like the idea of a really long and healthy life (e.g., more than 100 years)

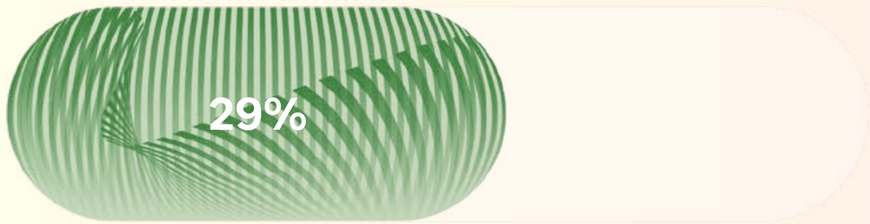




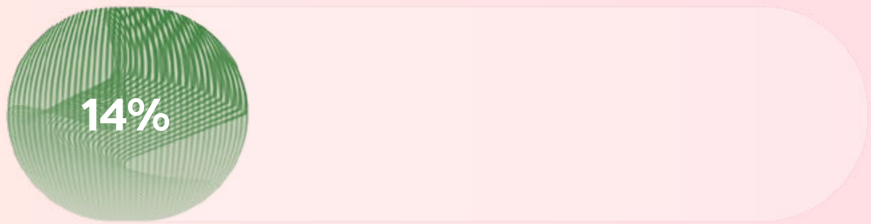
I could see myself falling in love with a chatbot/AI



Percent excited for the following:



Physical or mental capabilities augmented by technology



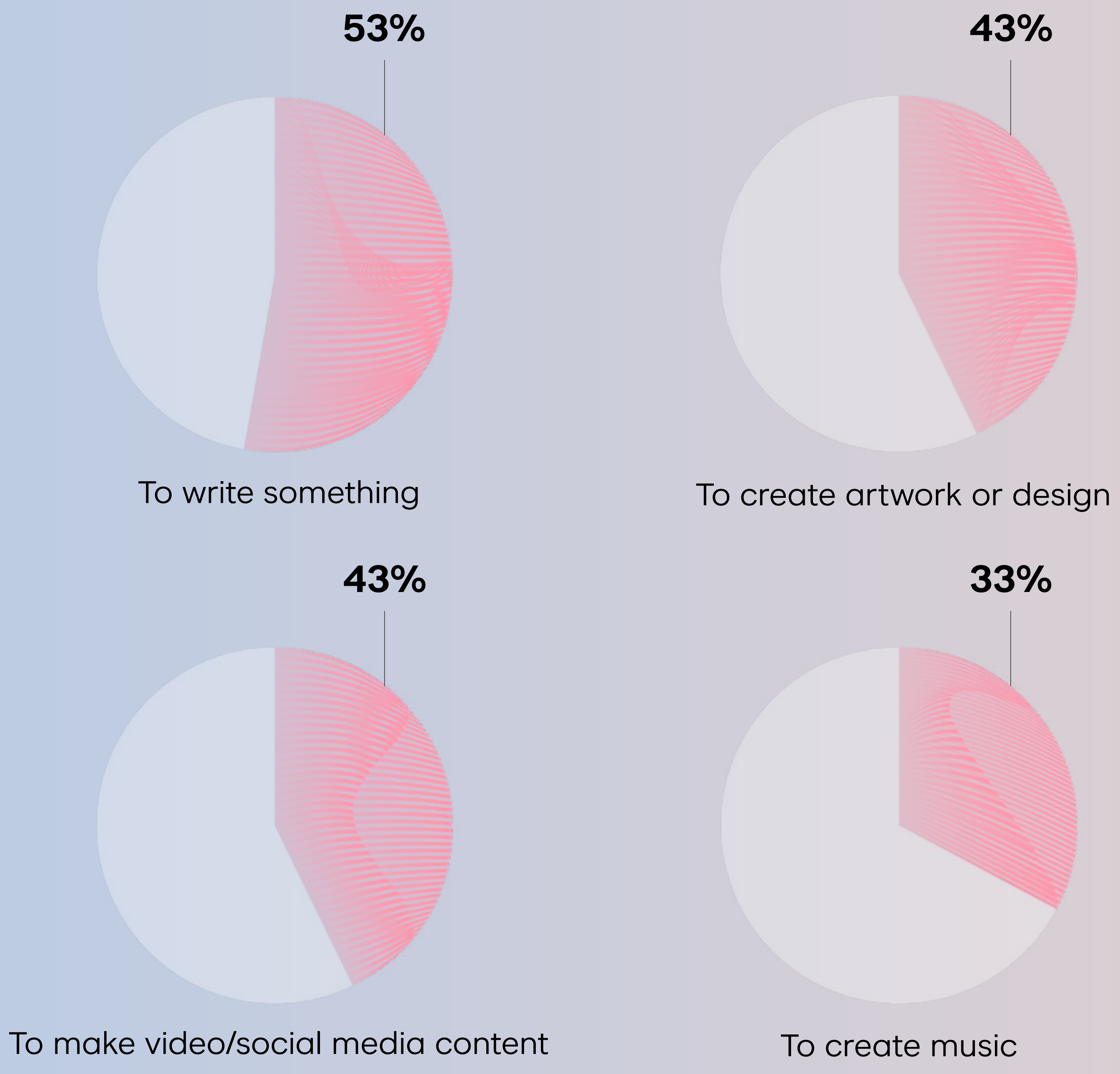
Avatars or chatbots based on the personality of a loved one who has passed

Percent who somewhat/strongly agree with each statement, global

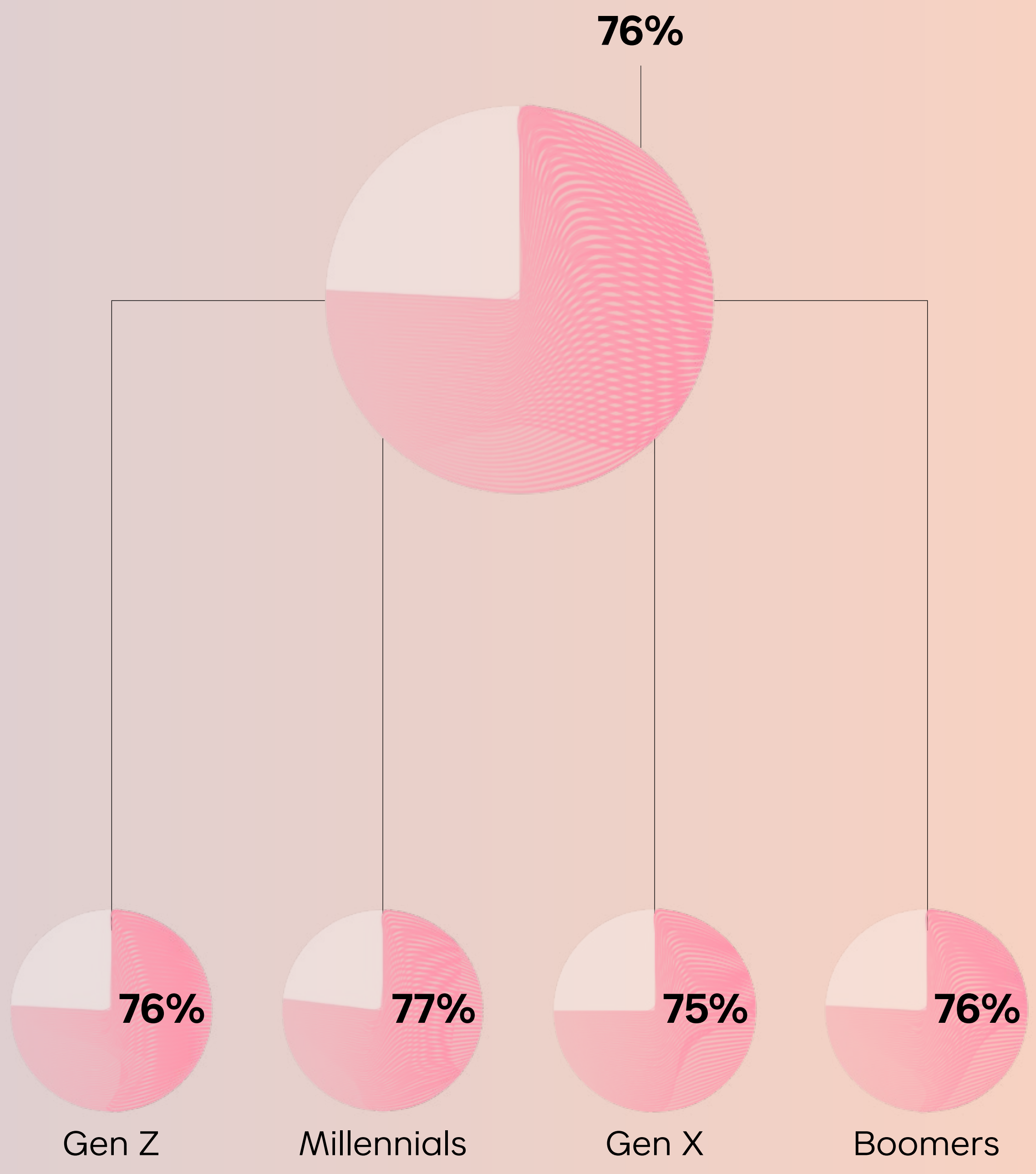
IN THE FUTURE, THANKS TO ADVANCED TOOLS LIKE GENERATIVE AI, EVERYONE WILL BE A CREATOR

Use of AI tools

Percent using for each purpose, global in the last 6 months

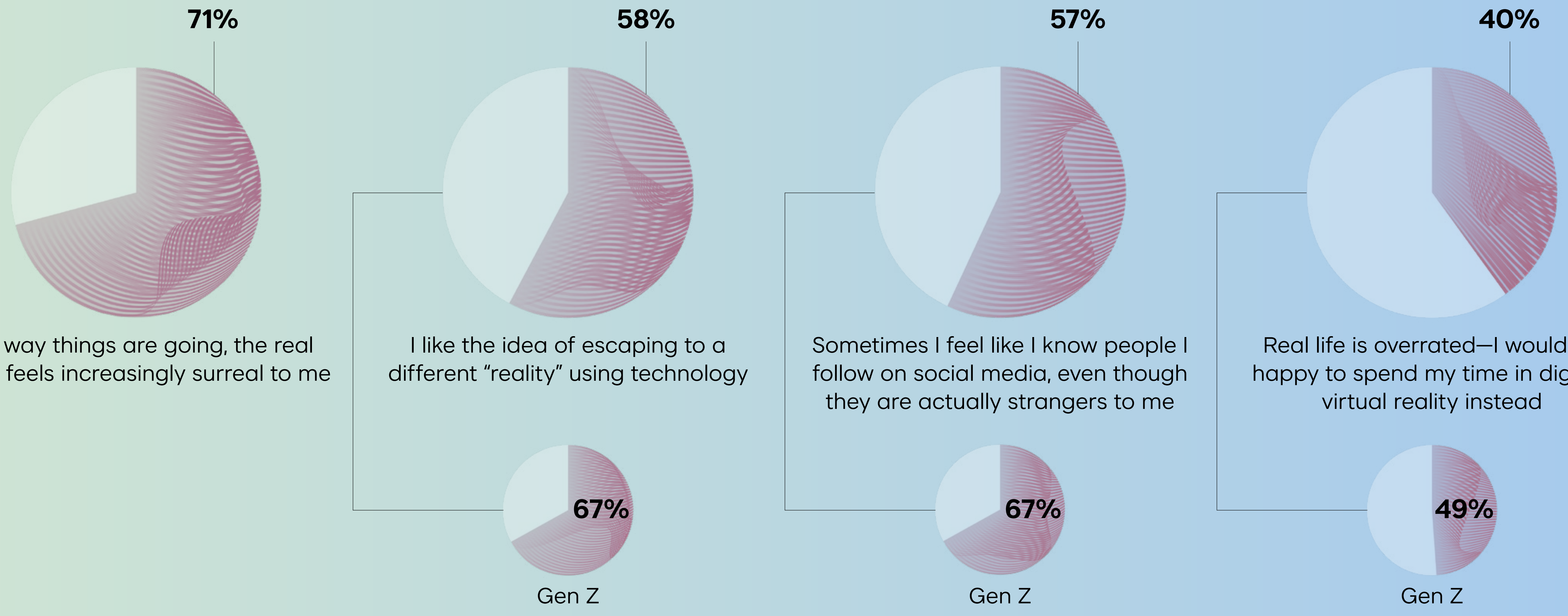


Technology will never take creativity away from humanity—it's part of who we are



Percent who somewhat/strongly agree with each statement, global

EVEN REALITY IS OURS TO SHAPE, INTO WHATEVER WE CAN IMAGINE



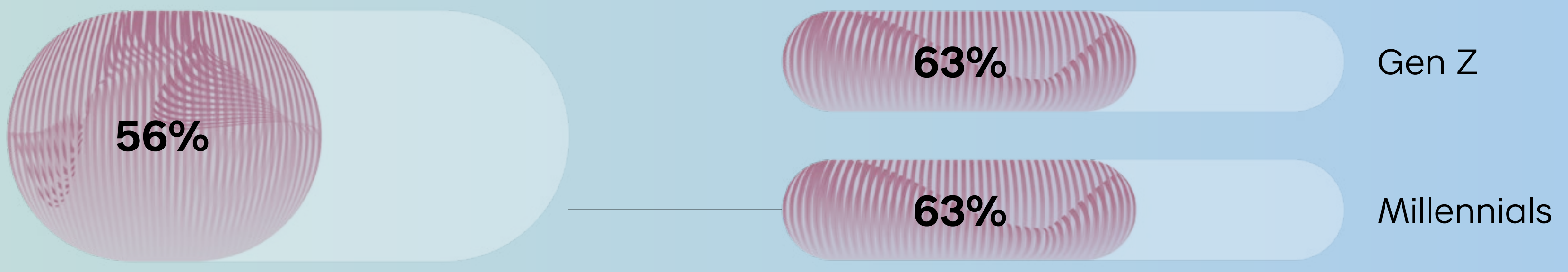
The way things are going, the real world feels increasingly surreal to me

I like the idea of escaping to a different "reality" using technology

Sometimes I feel like I know people I follow on social media, even though they are actually strangers to me

Real life is overrated—I would be happy to spend my time in digital/virtual reality instead

I spend more time with friends in digital spaces than I do in the physical world



Percent who somewhat/strongly agree with each statement, global

01

CULTURE

10

01

REALITY SHIFT

Generation Z's embrace of different realities is a manifesto for hope in a chaotic world.

Fantastic Frontiers, Adobe Stock

In July 2024 *Dazed* magazine explored the practice of reality shifting, in which participants try to transfer their consciousness to become aware of a desired reality. Shifters use various methods to experience alternative realities, which might be fictional worlds like the Marvel Universe or the *Harry Potter* stories, or an imagined reality. The phenomenon, which had spawned almost 40 million posts on TikTok as of December 2024 and multiple sub-Reddits, may sound like old-fashioned daydreaming but its proponents say it is more akin to manifesting.

On that topic, "manifest" was declared the word of the year for 2024 by Cambridge Dictionary, which notes a growing momentum behind the concept of willing your dreams into existence. Ariana Grande partly attributes her success to a "manifesting gift" and in 2024 the media pored over an unearthed tweet from 2011 in which the singer spoke of her now realized dream to play Glinda in *Wicked*.

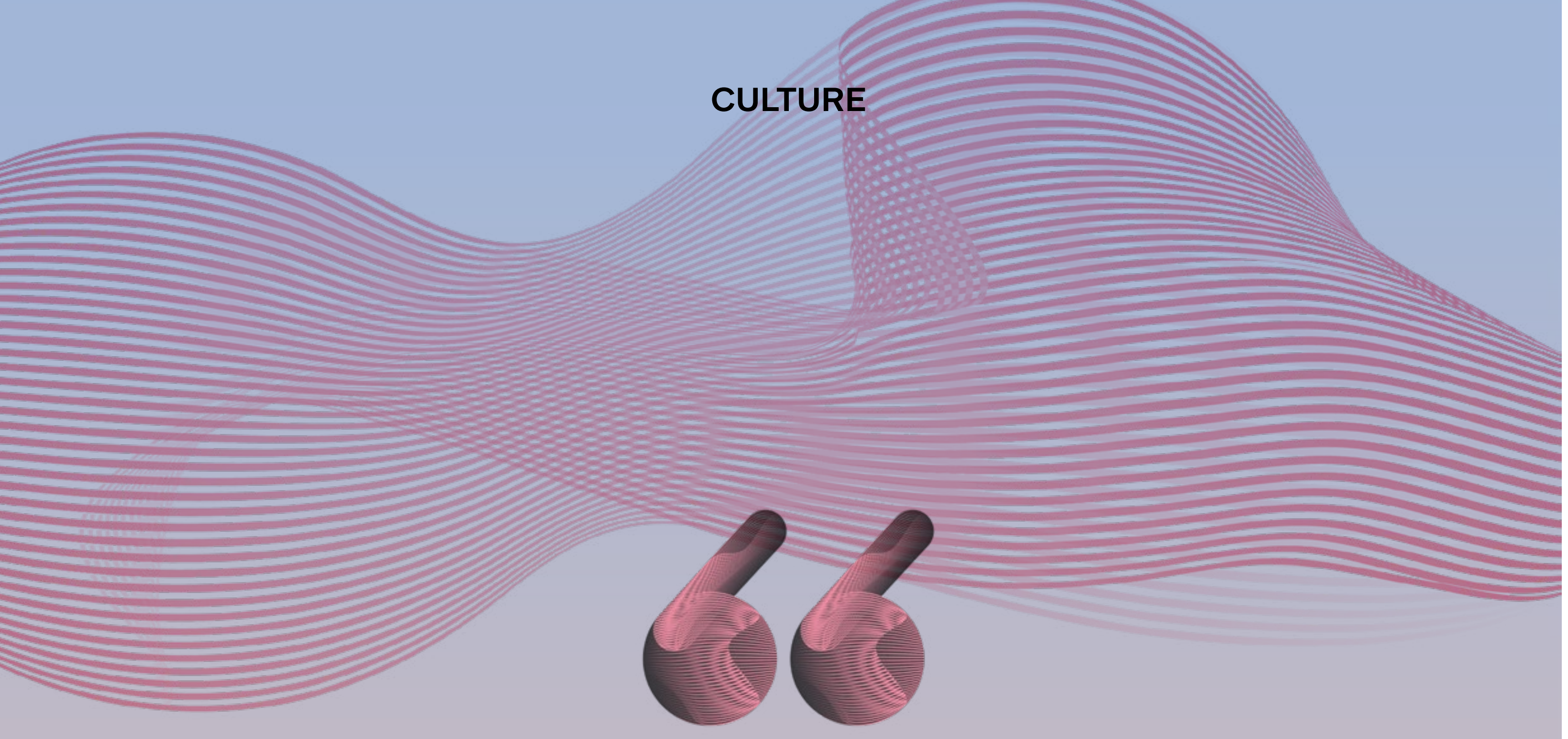
Fantastic Frontiers, Adobe Stock

There is global appetite for alternative realities: 67% of generation Z say they like the idea of escaping to a different reality using technology, compared to 58% for all ages. This cohort is also more likely to enjoy taking part in cosplay or live action role playing (51% compared to 41% total). The phenomenon is even showing up in culture: *Dazed* cites the A24 movie *I Saw the TV Glow* in which teenagers seek escape from their real-life dramas by immersing themselves in a fictional TV world.

The fascination with different realities is also suffusing the creative space as designers leverage generative AI tools to stretch the boundaries of realism. Adobe's Creative Trends 2025 report sums up its Fantastic Frontiers trend as "bringing unreality to life."

What is driving a generation to reimagine reality? VML Intelligence spoke to Dani Reyes, a psychometrician and researcher based in Manila, Philippines, and a card-carrying member of gen Z herself. Her TedX talk, "How gen Z's delulu culture impacts their reality," had garnered more than 447,000 views on YouTube as of January 2025, and explains how gen Z has co-opted the term delusion from its clinical definition and reframed it to stand for a kind of hope. Reyes says that an "unwavering optimism" is characteristic of her generation, which leads them to believe that "things will be fine, even if they don't have tangible evidence of things being okay."

Rather than signifying literal delusion, she says it's a coping strategy. Generation Z has come of age in challenging times, economically, socially, and politically. Social media has conditioned them to aspire to a good life, which they are struggling to realize. Reyes explains, "People just want a better life for themselves, to be able to rent, live a good life, to have savings, to travel, all these kinds of things. And I think these are very bare



> **“I THINK WE HAVE A SHOT AT EXPERIENCING BETTER THINGS. I THINK THAT WE’RE BOUND TO EXPERIENCE SOME KIND OF SYSTEMIC CHANGE SOON.**
>
> Dani Reyes, psychometrician and researcher

minimum wishes to have.” Hence the phrase, “delulu is the solulu” (delusion is the solution).

Sean Pillot de Chenecey, author of *The Post-Truth Business*, sees this as “an entirely reasonable and coherent choice” based on the world right now. Indeed, 73% of gen Z think that “the way things are going, the real world feels increasingly surreal.” Behavioral psychologist Jo Hemmings adds that practices like manifesting are “quite important in self-identity, because [they] give you a slight tribal sense of belonging, because a lot of people are doing it. It gives young people a platform where they feel they can relate to others.”

Embracing delusion then, is highly intentional: a form of optimism, and a route to imagining, or manifesting a better reality than the one in which you find yourself. And despite the precariousness of their future, gen Z is one of the most optimistic generations, based on VML data, both now and for the future (see page 6). Reyes embodies this characteristic optimism too. “As long as we’re still here,” she says, “I think we have a shot at experiencing better things. I think that we’re bound to experience some kind of systemic change soon. I feel like it’s a matter of when, not if.”

Why it’s interesting

Generation Z’s embrace of “delulu” culture and reality shifting is about optimism, not opting out. Brands can help by working towards better real-life futures with and for them, and salving their sense of detachment by fostering real-world connection and community with their peers.

01

Fantastic Frontiers, Adobe Stock

02

ELEMENTAL ELEGANCE

A warm, rich, and grounding sentiment drives the year ahead.

A wave of new neutrals makes headlines as color specialists rally understated hues that evoke comfort, harmony, and nature. This is good news for paint companies, shifting those warm, homely palettes onto walls—and bad news for brat green, which feels so… last year.

Mocha Mousse, a rich, chocolatey brown, was announced as the color of 2025 by Pantone in December 2024. “Sophisticated and lush, yet at the same time an unpretentious classic,” announced Leatrice Eiseman, executive director of the Pantone Color Institute. “Mocha Mousse extends our perceptions of the browns from being humble and grounded to embrace aspirational and luxe.” Perhaps in a nod to shades of quiet luxury and indulgent desserts, Eiseman says the color is “underpinned by our desire for everyday pleasures.” (See Affordable affluence, p214, to see how daily indulgences have identity-shaping importance.)

The earthy tone is a harmonious shade that works well alongside a range of colors. Fashion lines including Loro Piana and Max Mara have opted for an elegant array of neutrals for their spring/summer 2025 collections, which span beiges and tans to grays and browns. It’s a departure from the usual bold and bright colors associated with those seasons and a nod to an unpretentious, yet grounding year ahead.

Sherwin-Williams took a different approach this year. Rather than heralding a sole color to capture the mood of 2025, the US-based paint company curated its first Color Capsule of the Year, with nine shades. Ranging from Grounded, an earthy brown, to Sunbleached, a warm off-white, the capsule is rooted in elemental neutrals that are modern and balanced.

Color of
the Year
2025
PANTONE®
Mocha Mousse
17-1230

Other paint companies also agreed on restorative and warm tones to capture the year ahead. California-based Dunn-Edwards selected Caramelized, an earthy light brown. C2 Paint picked Raku, a deep and sophisticated burgundy which is "an expression of balance, comfort, and timeless elegance," says Philippa Radon, C2 Paint color director. And paint company Benjamin Moore chose Cinnamon Slate, a slick and modern plum-brown, to represent 2025.

Why it's interesting

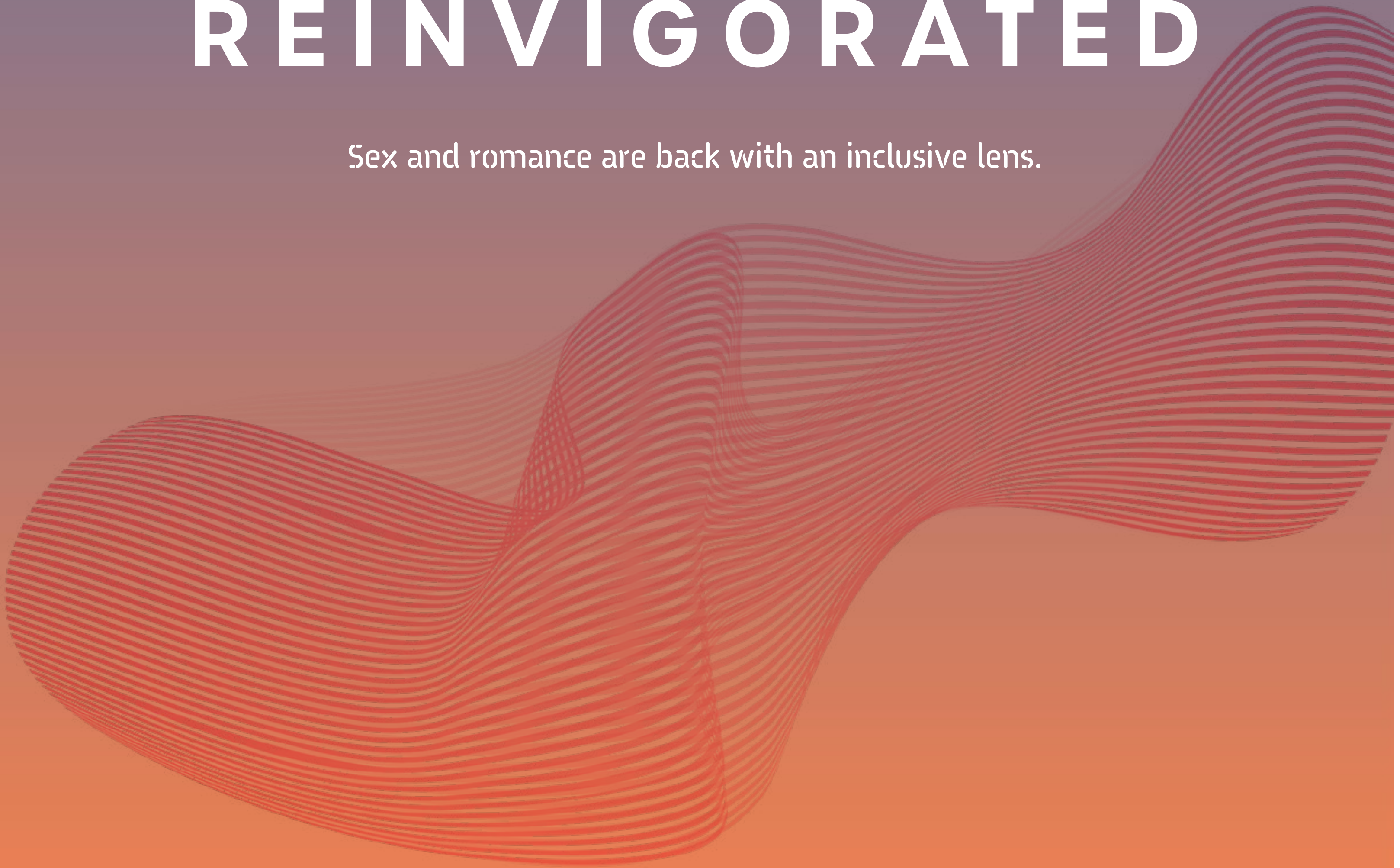
The mood for 2025 is set around enriching comforts (think indulgent coffees or desserts) as well as sophistication and confidence (that's the understated luxury speaking up). Be prepared for a grounding experience that shifts away from maximalist glitz and bright, brash bolds to homey and humbling elegance.

Mocha Mousse, Pantone Color of the Year 2025

03

SEXY REINVIGORATED

Sex and romance are back with an inclusive lens.



Rivals on Disney+ and Hulu

Rivals on Disney+ and Hulu

While we live in what *Harper's Bazaar* calls "unsexy times," popular culture is making a raunchy handbrake turn, with music, cinema, and fiction turning up the heat.

According to data, *everyone* is having less sex these days. Chaste generation Z claims not to want to see it on screen, reports a recent UCLA study. And yet, after a decade or more of restraint, signs are that sexy is back. Case in point: Disney+ and Hulu's eight-part adaptation of Jilly Cooper's 1980s steamy bestseller *Rivals*. The *Atlantic* described the tale of rural social elites as "the silliest, sexiest show of the year."

Romantic and erotic fiction reviews are booming on TikTok under hashtags like #spicybooktok, #smutok, #romantasy, and more, while romance-only bookstores are popping up thanks to booming print sales.

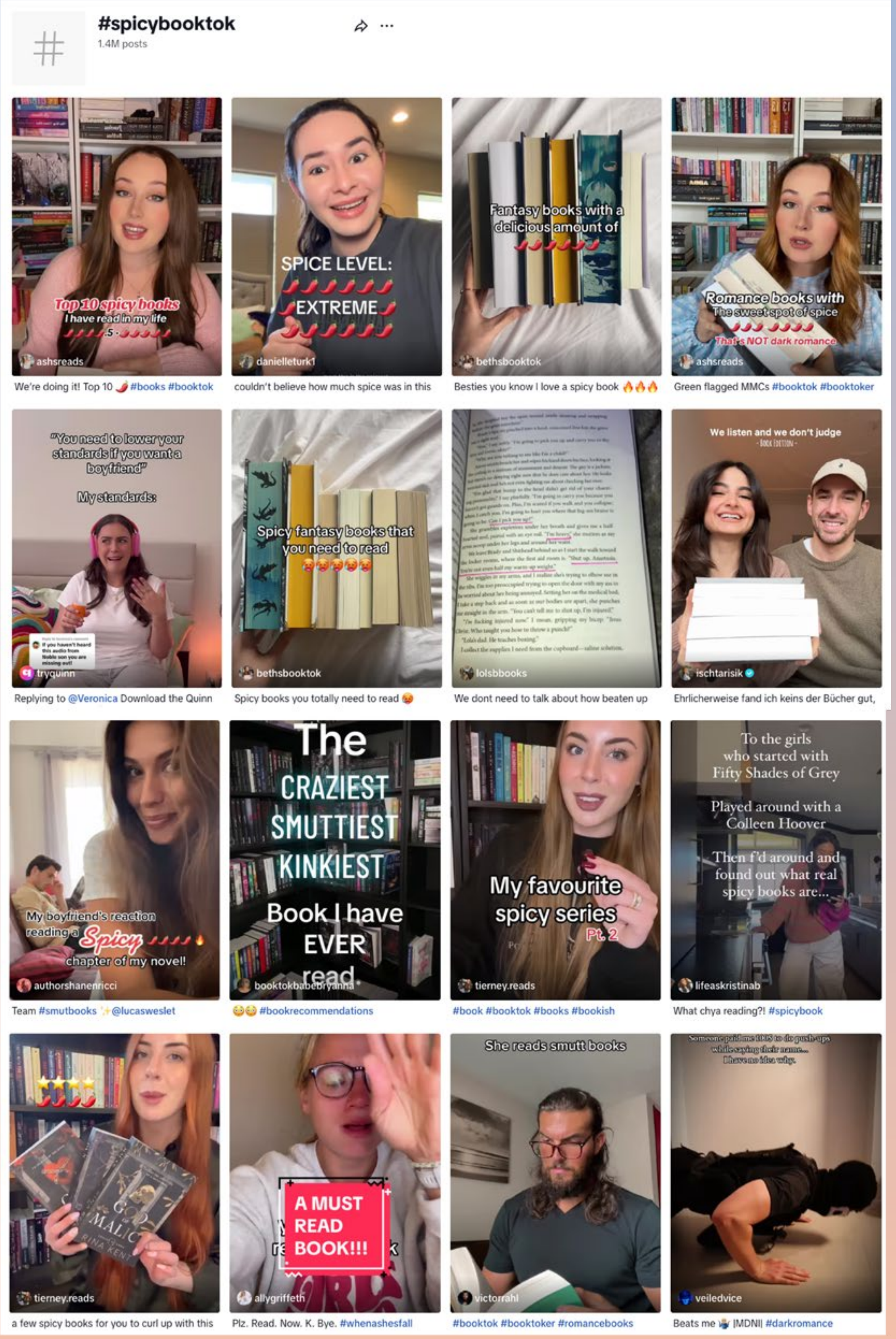
In the United States, sales of romance and erotica titles reached 39 million in 2023 according to Circana Bookscan, almost doubling since 2020. 8th Note Press, an imprint of ByteDance, TikTok's parent company, will even publish trending print romances from February 2025.

Sensuality is spilling into design too. Decor is a getting a raunchy makeover thanks to Central St Martins graduate Kacper Motyka's "sex-centered furniture" designed specifically for "elevating intimate experiences." Brands such as Fleur du Mal and Savage X by Fenty are churning lace and velvet lingerie for men.

Behavioral psychologist Jo Hemmings tells VML Intelligence that the return to romance is a form of escapism. "These fantasies often cater to idealized or exaggerated forms of intimacy," she says, "such as perfectly choreographed encounters or relationships filled with chemistry, which real-world experiences rarely live up to. It may point to unmet emotional needs, the impacts of a rapidly changing world, and a recalibration of how intimacy is expressed and experienced."

Another interpretation is that a new generation wants to see their sexuality represented more broadly, or through a different lens to the traditional male gaze. Sean Baker, director of Oscars Best Picture hopeful *Anora*, told *BK Mag* that filmmakers are "in a place now where we're approaching sexuality, hopefully, in a more responsible and aware way, and it's going to be interesting to see the way it plays out." Indeed, many of the new wave of movies and TV that explore sexuality cover less well-trodden territory. Halina Reijn's *Babygirl* is about a female CEO who has an affair with an intern, and Luca Guadagnino's *Queer* tells the story of an American expat's infatuation with a younger man.

03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Beats me 🤷 |MDNI| #darkromance

Romantic fiction is also giving greater space to authors from diverse backgrounds and telling stories about atypical romantic relationships. Caden Armstrong, who owns the romance-focused Book Lovers Bookshop in Edinburgh, describes it as "an incredibly diverse genre that highlights so many incredible voices and perspectives."

In tandem, in an era in which women and LGBTQ people are seeing their rights curtailed, reclaiming sexuality can be a mark of empowerment. A wave of young female singers such as Charli XCX, Chappell Roan, and Doja Cat are unabashedly asserting their sexuality in their lyrics, and on stage, while Sabrina Carpenter, named one of *Time* magazine's Next100, has been triggering some pearl-clutching for her tour performances in tiny crystal-encrusted bodysuits. Sex educator and academic Ericka Hart told the *Standard* that this is part of "a continued wave of asserting bodily autonomy."

Why it's interesting

Sex is back but this time through an inclusive lens, symbolizing empowerment, escape, autonomy, and joy.

#spicybooktok on TikTok

04

WORK RESORTS

The five-star office has further elevated into wellness sanctuaries and purpose-driven community hubs.

The Park by Mike Van Tassell

The Park in New Jersey is confident that the way of working has changed. Its mission is to elevate living and office life through design, community-driven programs, and wellness activities, and it hopes that a $500 million redevelopment announced in November 2024 will make it a major destination neighborhood. The complex includes workplaces, event spaces, restaurants, and parks, as well as fitness and social clubs. Selected areas are for members only, however, and the entire complex is imbued with an exclusive club approach—one that prioritizes wellbeing and connection.

This members' club approach aligns with an August 2024 article in the *New York Times* that pointed out the "hotelification" of offices—an effort to promote happier and healthier employees, while driving a new perception of the workplace. It spotlights Springline, a purpose-built destination in downtown Menlo Park, California, which comprises two office buildings, an 183-unit residential building, nine restaurants, and outdoor spaces. Springline, which opened in September 2023, dubs itself the "coolest new neighborhood around" and offers a resort-style campus where people work, connect, and indulge. Taking cues from luxury hotels, there's a signature scent that goes with the property, and an overall sense of exclusivity as the management runs the neighborhood much like a resort.

In Hangzhou, China, architecture firm NBBJ has completed the fourth phase of its conceptualization of a large Zhejiang-based internet company. The campus is designed to cater for both employees and the public, creating a neighborhood that includes events spaces, restaurants, a florist, a post office, and green space. NBBJ told *Dezeen* that the client hoped to create a "future-forward, green and healthy office park" and a "pleasant experience" for both employees and visitors, with "a connecting space between departments," and also to "establish a dialogue between office and greening."

By prioritizing human wellness and purposeful communities, the workplace expands beyond the office to align with sentiments around the potential for work to play a positive role in people's lives. Eighty-six percent of people globally say they enjoy a good work-life balance and 93% say businesses should take more responsibility for the health of their employees, according to VML Intelligence's October 2023 study featured in "The Future 100: 2024."

Why it's interesting

Companies and developers are aware that a space to work is not enough. In response they are creating "office resorts" and lively neighborhoods.

Che Fico Parco Menlo at Springline by Douglas Friedman

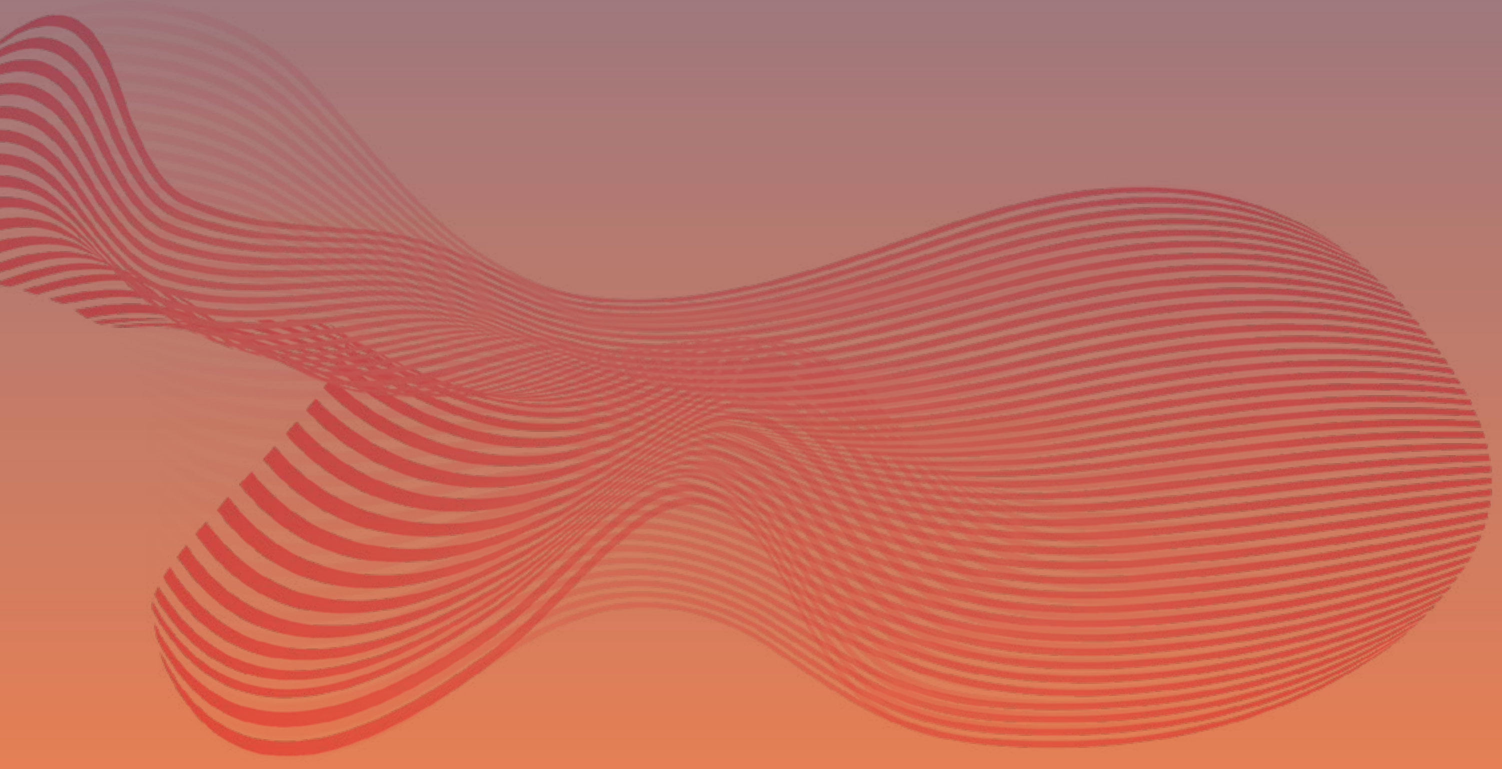
04

Company campus, Zhejiang, China, NBBJ

05

DARK MATTER

In chaotic times, popular culture is mining a darker seam.



Amid political turbulence and climate breakdown, people are seeking comfort in discomfort, leaning into dark stories and experiences that offer a form of catharsis.

In cinema, horror movies are holding up a mirror to societal anxieties. While the genre is perennial, film data researcher Stephen Follows reports that more horror movies are being made than ever, by more countries, driving an expansion in perspectives and sub-genres. The trend is set to continue in 2025, from Ryan Coogler's thriller *Sinners*, set in the southern United States during the Jim Crow era, and *Gory: A Horror Tale*, from South Korea's Acemaker movieworks to Danny Boyle's much anticipated zombie sequel *28 Years Later.* A slew of horror-themed games are also on the slate for 2025, among them Polish developer Bloober Team's *Cronos: The New Dawn*, set in a futuristic wasteland.

Horror is not just a reflection of darker times, it also acts as a coping mechanism. Behavioral psychologist Jo Hemmings tells VML Intelligence that this can be considered a form of release, explaining that "horror films are a very safe way to confront fears and anxieties of death" and of "the unknown" and "breakdown in society."

Coltan Scrivner, a behavioral scientist at Denmark's Recreational Fear Lab at Aarhus University interviewed for VML's "Age of Re-enchantment" report, says that recreational fear is "an off-ramp for anxiety." When fear is experienced in a safe space and a controlled environment, it can be explored without danger, giving a sense of mastery. In this way, horror movies are helping people navigate contemporary fears. In an era of pushback to women's empowerment it's no coincidence that there has

The Map Room, Dark Matter: Nightmare Before Midnight at Mercer Labs

been a rise in female-centered body horror movies like *The Substance* and *Nightbitch*.

The rise of autofictional stories of personal trauma, abuse, addiction, and loss, from Netflix's *Baby Reindeer* to standup comedian Ed Byrne's one-man show *Tragedy Plus Time*, point to shifting cultural norms and destigmatization. People are more willing to discuss difficult topics, which is in turn creating space for more authentic and nuanced portrayals of these experiences in culture. Hemmings explains that "using humor to explore pain or difficult issues can be validating for people and can help them gain understanding."

At New York's Mercer Labs Museum of Art and Technology, an immersive art exhibition called Dark Matter invites visitors to step inside their deepest fears in a high-tech 4D technicolor rendering of the haunted house as gallery. Artist and cofounder Roy Nachum says that the exhibit "explores surreal and hypnotic themes of darkness and the human psyche and the unsettling realm of nightmares, inner demons and paranormal occurrences."

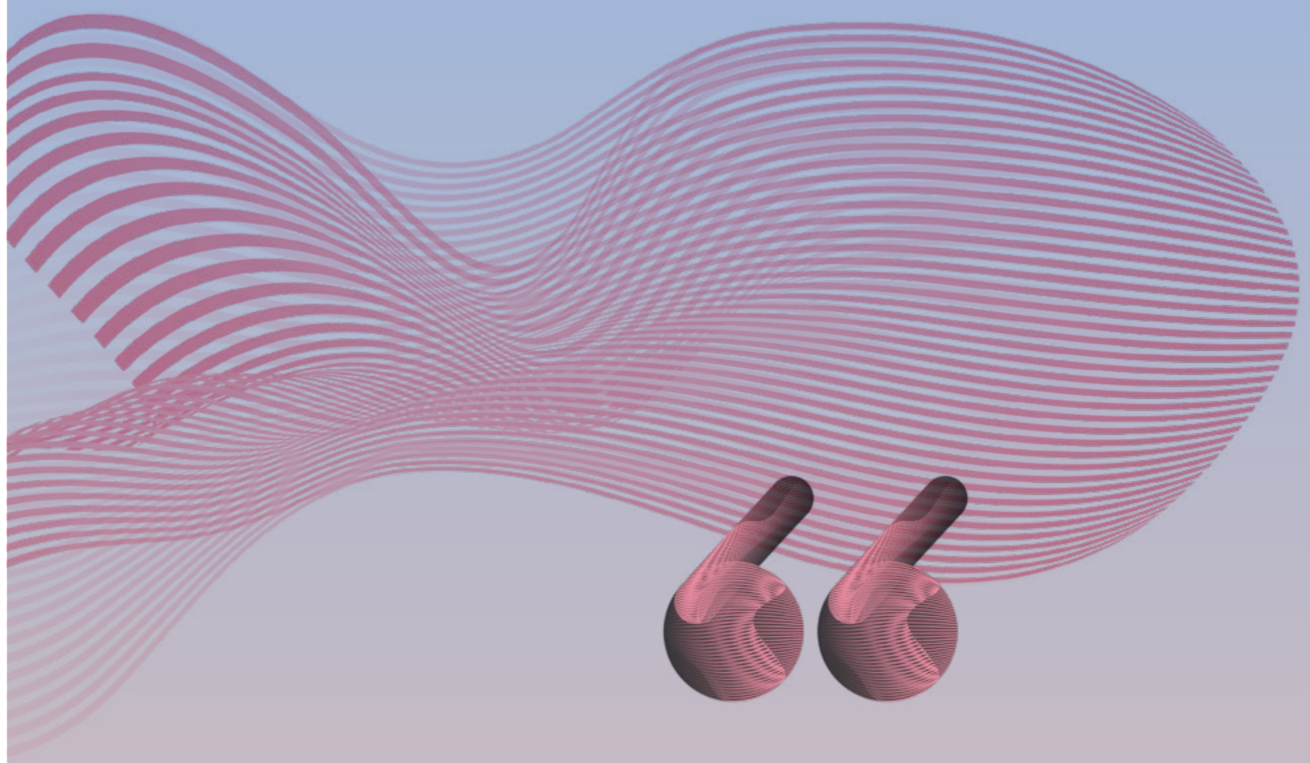
Immersion in nightmares like this is a form of eustress or recreational fear that, much like watching horror movies, releases adrenaline in a safe, controlled space. "Eustress is the only healthy form of stress," Hemmings explains. "It's what you get when watching a horror film or on a rollercoaster, where you volunteer to be petrified." This could offer a way for brands to tap into darkness to engage consumers, she says. "If they could somehow tap into that form of stress, it's the only good form there is. It offers excitement and an adrenaline rush, but in a very healthy way that gets all sorts of anxieties out of the system."

The Map Room, Dark Matter: Nightmare Before Midnight at Mercer Labs

For brands, scares offer a way to reach younger generations. In a 2023 study, VML found that almost half of gen Z in the United Kingdom, the United States, and China think entertainment experiences based on horror can be therapeutic, compared to just a third on average. Indeed, cookie brand Nutter Butter has gone viral on TikTok by leaning in to the macabre; posts featuring crime scenes smeared in peanut butter have horrified and delighted audiences.

Why it's interesting

Experiences mining a darker seam offer ways for people to process complexity, experience an adrenaline rush, and gain a sense of mastery by overcoming the challenge. Brands tend to lean in to darkness just for Halloween but tapping into eustress could be a year-round opportunity.

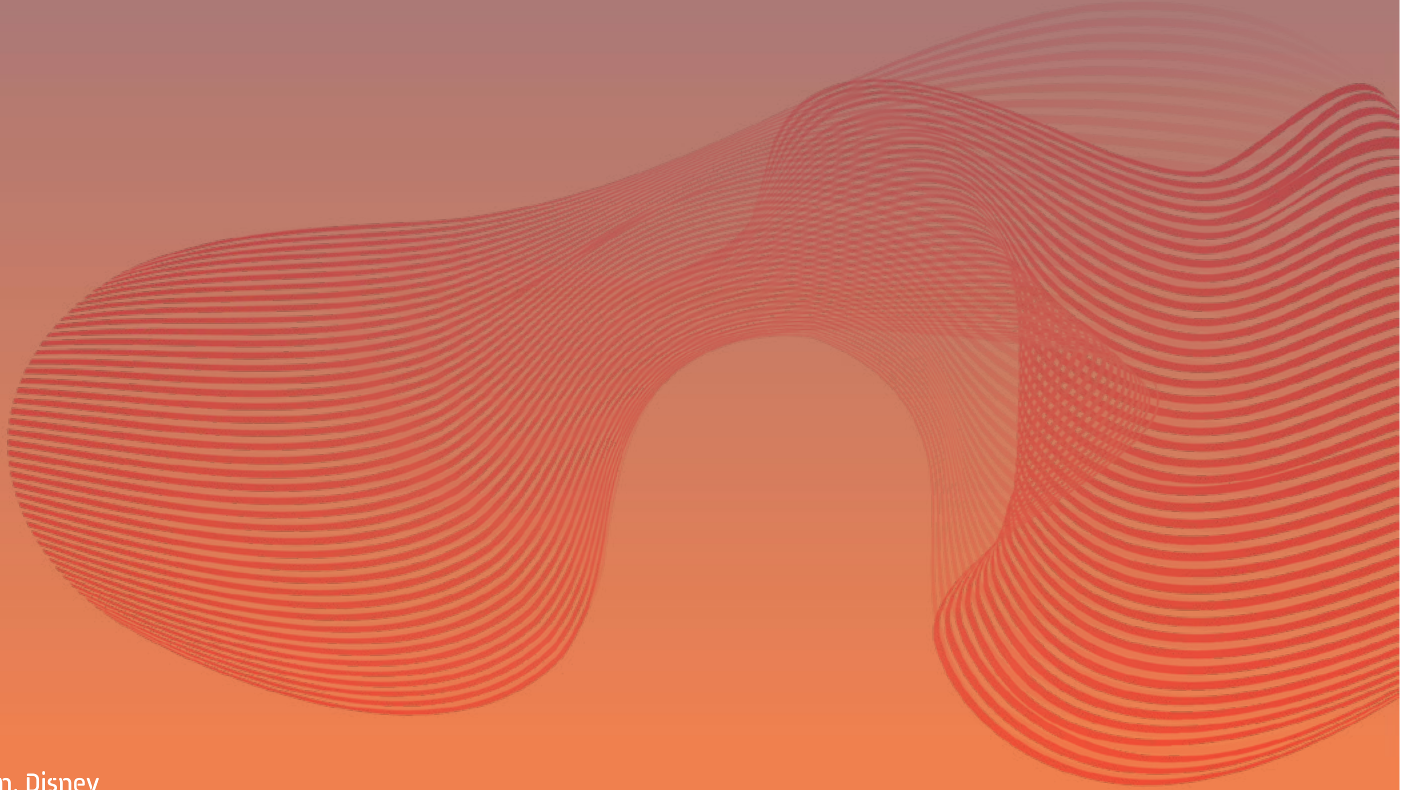


> “USING HUMOR TO EXPLORE PAIN OR DIFFICULT ISSUES CAN BE VALIDATING FOR PEOPLE AND CAN HELP THEM GAIN UNDERSTANDING.
>
> Jo Hemmings, behavioral psychologist

06

JAPAN'S SOFT POWER

Japan's economy is on the rise—and so is the country's cultural capital.



Shōgun, Disney

Japan's economy "is undergoing a significant transformation with the end of deflation, the return of steady growth, and a new corporate dynamism," Morgan Stanley observed in June 2024, following what the bank described as "three decades of stagnation."

Japan's cultural power is also on the rise. The Disney/FX series *Shōgun* made history at the 2024 Emmys and Creative Arts Emmys, winning a record 18 awards. Set in 17th-century Japan, *Shōgun* drew its cast and crew from creative elites in both Japan and Hollywood, and 70% of its dialogue was in Japanese.

The value of Japan's content exports, mainly its games, manga, anime, and movies, is, at $29.5 billion, "nearly as big as the country's

semiconductor-related exports, or the estimated value of all spending this year [2024] by tourists to the country—many of whom are inspired to visit by those same cultural exports," reported the *Japan Times*. The newspaper also reported that in June 2024, the Japanese government announced that it was seeking to expand its overseas market for video games, manga, and anime fourfold to a value of ¥20 trillion ($130 billion) by 2033. The Japanese cabinet office described its soft-power strategy as "an extremely potent means of ensuring Japan can maintain its presence and influence on the global stage."

Anime's global appeal is duly expanding. In a 2024 report, Polygon dubs anime "the new *Friends*" for gen Z, as it makes "a massive impact on

Shōgun, Disney

Hello Kitty installation in the Cute exhibition at Somerset House. Courtesy of David Parry/PA for Somerset House modern audiences in everything from how they dress to how they interact with those around them." Keen to nurture this growing appetite, brands are tapping their widespread appeal. In 2024, McDonald's took an immersive dive into the anime universe with its WcDonald's campaign (see Brand fandoms, page 96 for more). "Anime is a huge part of today's culture, and we love that our fans have been inviting us into the conversation for years," says Tariq Hassan, chief marketing and customer experience officer at McDonald's USA.

Luxury fashion house Louis Vuitton collaborated with Japanese contemporary artist Takashi Murakami for a joyful and vibrant collection launched on January 1, 2025. Murakami's work combines anime and fantasy in a colorful, quirky, and sometimes dark fashion. This new collection is expected to be as brave as Louis Vuitton's collaboration with Japanese artist Yayoi Kusama in 2022, where stores were taken over by her artistic aesthetic.

This fascination with Japan is also having a cultural impact around the world. In spring 2024, the Cute exhibition at London's Somerset House explored the global rise of Japanese kawaii (translating to cute/loveable) pop culture and how its aesthetics have permeated everything from fashion and art to packaged goods and technology. The exhibition was held in partnership with Japan's Sanrio, to celebrate its Hello Kitty character's 50th anniversary.

As for tourism, the country anticipated 35 million visitors in 2024, who were forecast to spend $51 billion (¥8 trillion), surpassing Japan's pre-pandemic tourism peak of 31.88 million in 2019, according to Skift. The government is planning for visitor numbers of 60 million by 2030, spending more than $96 billion (¥15 trillion). Osaka is one of the must-visit cities to visit in 2025—see Top three destinations, page 90.

Hello Love by Hattie Stewart on display on Somerset House's River Terrace as part of the Cute exhibitio. Courtesy of David Parry/PA for Somerset House

Why it's interesting

Japan's current cultural moment is positioning the country as a powerhouse of inspiration globally, and brands are on board the Cool Japan train, leaning in to cultural currency that is embraced globally across generations.

07

NEW DATING PARADIGMS

With interest in dating apps waning, people are finding new ways of seeking out connections.

Swiping for a perfect match on dating apps is no longer the phenomenon it once was. Only 22% of people open to dating say they have been using dating apps in the past 12 months. CNN reported that Tinder downloads in the United States fell from a height of 13.8 million in 2014 to 8.8 million in 2023. And in the United Kingdom, Ofcom reported that the four top dating apps, Tinder, Hinge, Bumble, and Grindr, have lost hundreds of thousands of users. Its 2024 analysis suggests that "for younger people, particularly gen Z, the novelty of dating apps is wearing off."

This is reflected among US college students, where dating app use is especially low. An Axios/Generation Lab survey published in 2023 found that 79% of US college and graduate students don't use any dating apps at all. "I feel dating apps have ruined the dating scene for many people my age and ruined their self-confidence," Melanie Perez, a junior at Sam Houston State University, told Axios. "I'd rather meet and start as friends than use an app that'll most likely end in hookups."

The somewhat transactional nature of dating apps is being replaced by ways of finding romance that draw on more traditional dating customs, such as shared hobbies (see Social hobby apps, page 56). The "date-me docs" reported by the *New York Times* are becoming a niche way of dating among "people who work in the technology industry and live in major US cities." The publication describes these long-form documents as "more akin to newspaper personal ads than any bio posted on an algorithm-driven, swipe-based app." In China, the old-fashioned art of matchmaking is making a comeback, with the *South China Morning Post* reporting on Auntie Wang's Matchmaking, a live event in Kaifeng in China's Henan province.

And IRL dates are coming back into focus. Over a third (35%) of people globally are using in-person social settings to meet new people. This increases even further in some countries, to 45% in Brazil, 41% in Thailand, and 47% in South Africa, showing a gradual shift away from dating apps. According to a 2024 report from Eventbrite, data it collected in the United States in the year to April 2024 revealed that 376,000 people had attended dating and singles events booked via the site, and that there had been more than 1.5 million searches for dating and singles events over the year. This preference for meeting in person is seen in China too. *China Daily* reports that gen Z are meeting significant others through activities such as frisbee, role-playing games, and crafts.

TimeLeft is an in-person intimate dinner club, inviting strangers to ditch smartphones for smart conversations. The site states it wants people to open up to others without expectations, “start a conversation, start a spark.” Initially launched in London in May 2023, it now has a presence in over 60 countries and 275 cities.

To keep pace, dating apps are evolving in tandem and broadening the ways in which they connect people, pivoting to being about forming all kinds of connections. In its latest campaign, “Come Home With Us,” Grindr highlighted the myriad connections that had been forged via the app, from marriage to a throuple to romance to friendship.

Why it’s interesting

Younger generations are seeking connections at in-person events, while for older generations, forming connections, both romantic and non-romantic, in diverse ways takes priority. Dating platforms are evolving to capture these multifaceted relationships.

Top: Beginning Beekeeping, Garden By Nature, San Francisco, California
Bottom: Wine and Watercolors, Shop Made in DC, Georgetown, Washington DC. Courtesy of Eventbrite

08

THE ANALOG MOVEMENT

In a backlash to the ever-more frantic pace of the digital world, analog pursuits are booming.

Digital detox hangouts, The Offline Club

“Many of us are reaching burnout with our constant exposure to screens,” Stefan Walters, a psychological therapist at London’s Harley Therapy, tells VML Intelligence. “We’re fed up of Zoom meetings, emails, and WhatsApp messages, and are craving in-person connection and nature.” He notes that the draw of in-person interaction has a physiological basis: “This is good for our brain and nervous system, as it engages a more mindful flow state where the focus is simply on ‘being,’ rather than a constant state of sympathetic arousal and ‘doing’. Our subcortical processing brain is able to be present and calm, while our neocortical thinking and acting brain can take a much-needed break.”

Walters’ observations align with a global sentiment: 84% agree that people are less present these days because of increased technology, and 88% wish that life could be simpler sometimes. Alongside the opportunity that such activities present for “more meaningful connection,” Walters

> **WE'RE FED UP OF ZOOM MEETINGS, EMAILS, AND WHATSAPP MESSAGES, AND ARE CRAVING IN-PERSON CONNECTION AND NATURE.**
>
> Stefan Walters, psychological therapist, Harley Therapy

Reading Rhythms events. Courtesy of Reading Rhythms

also notes that analog activities create a sense of comfort and nostalgia. "As infants we all started by playing with objects, not by looking at screens," he says. "There is something very primal and engaging about returning to these sorts of activities."

As we noted in "The Future 100: 2024" Luddite mode trend, younger generations are being drawn to physical formats and pursuits. *Fortune* argued that this represents "an act of identity assertion, innovation, and a point of differentiation for the under-25s. It is also an act of defiance in the face of the formless digital world and a cry for respite from the enormous noise perpetuated by the 24/7 social media cycle."

This is influencing the way people travel. A BBC article noted an uptick in urban sketching—travelers pausing for long stretches to draw a specific destination. Urban Sketchers is a non-profit organization promoting on-location drawing by organizing meetups and trips to connect like-minded people.

The Offline Club, based in the Netherlands, invites people to digitally unplug by handing in their phones during its events, to promote relaxation and meaningful connection with others. The Offline Club's motto is "swap screen time for real time." Events operate globally and range from weekend getaways filled with nature walks and yoga to board games and journaling in a church. Launched in 2022, the club hopes to expand its presence from seven cities to 14. Book clubs are also being reimagined as social events. In New York, Reading Rhythms is described as "a reading experience like no other: an hour of reading per night, set to a backdrop of ambient live music and beautifully curated venues."

Degree students at Hampton Court Palace, courtesy of the Royal School of Needlework

This trend toward analog is also seen in China. *China Daily* reported in October 2024 that young Chinese people are turning to side hustles such as crafting ceramics and offering everything from singing lessons to freelance writing, with these pursuits offering "enriching experiences and enhanced personal fulfillment." In the United Kingdom, pottery has seen a bump in popularity, as television network ITV reported. Social Pottery, a UK network of pottery studios with three different London locations and two in Milton Keynes, offers both social-focused pottery parties and courses in the craft.

Needlepoint has a host of celebrity fans including Taylor Swift, Julia Roberts, and Amy Adams, according to the BBC. Susan Kay-Williams, chief executive of the UK's Royal School of Needlework, told the BBC that she believes embroidery's popularity emerged out of the COVID-19 lockdowns: "There was a resurgence of embroidery as a whole, and needlepoint is a good place to start because the holes on the canvas help guide you. Also, there's something very meditative about the repetition of needlepoint stitching."

Why it's interesting

More people are being drawn to the flow that comes with being immersed in analog pursuits. Observed on a global scale, being able to participate in purposeful, physical activities is perceived as both aspirational and desirable.

09

OTHERHOOD

"Otherhood" is transforming what it means to be a woman today.

Motherhood has long been seen as central to female identity, but now a growing number of women and nonbinary people are redefining what it means to build a fulfilling life. By choosing "otherhood"—being childfree or opting out of the traditional nuclear family—over motherhood, they are signaling evolving priorities, societal changes, and a conscious rejection of outdated expectations.

Declining birth rates in wealthier nations are testament to this cultural shift. And while some women may not have children due to circumstance, a significant portion are actively choosing childfree lives. Academic research in the United States suggests this could total more than a quarter of women.

VML's data suggests that being childfree is now widely accepted: 85% of people agree that choosing not to have children should be respected as a life choice. Yet societal stigma remains, rooted in views that tie a woman's worth to her reproductive role and shame women for failing to live up to it.

Ruby Warrington, author of *Women Without Kids*, explains to VML Intelligence that while "alternative family structures are becoming more normal, this has led to a conservative pushback." In Russia, for instance, a proposed law would ban "propaganda" championing childfree lifestyles as a way to improve the country's birthrate. "Childless cat ladies" were also a political football in last year's US election. Warrington argues that challenging these norms is essential for progress, paving the way for more diverse and inclusive family structures.

On social media, a slew of content creators are rebranding childfree lifestyles as a positive choice. Madalin Giorgetta (Australia), Dominique

Baker (Canada), Danni Duncan (New Zealand), and Abigail Porter (the United States) are rapidly building an audience of women eagerly seeking representation.

The otherhood movement is not just about rejecting motherhood; it's about embracing alternative ways to create meaningful connections and build supportive networks. Women are also finding fulfillment in strong friendships, chosen families, and platonic partnerships. Divorcée Jenny Hensley's viral TikTok video, showcasing her compound-style living arrangement with extended family and friends, exemplifies this trend. Her story resonated with millions, highlighting a desire for community and connection beyond the traditional nuclear family.

Platonic parenting has also been garnering attention, where people—whether of the opposite sex, the same sex, or in groups of friends—consciously decide to have or raise children together, outside a traditional family structure. Modamily, an app that allows users to connect with sperm and egg donors or potential coparenting partners, has the tagline "a new way to family."

In an age when 83% of women say it's okay to be single and not have a conventional family life, and 80% believe close friends can fulfil the role of family just as well as biological relatives, it shows a modern stance on relationships. The rise of otherhood represents a powerful shift in how women define themselves and build their lives. As more women embrace otherhood, they are not only redefining family but also reshaping society itself.

RUBY WARRINGTON
WOMEN
without
KIDS
THE REVOLUTIONARY RISE OF AN UNSUNG SISTERHOOD

Why it's interesting

According to 68% of women globally, "the brands I buy say a lot about me and my identity." Brands must adapt to reflect the diverse realities of women's lives, acknowledging and celebrating their choices. Marketing, product development, and service offerings need to move beyond the nuclear family model and embrace the inclusivity of otherhood.

Women Without Kids. Courtesy of Ruby Warrington

10

SUPERFORECASTERS

Predicting the future is a carefully crafted business, and one where humans still outpace AI.

From predicting everything from global conflicts and election results to stock prices and economic volatility, superforecasters are at the frontier of change. Superforecasters are those with a solid track record of accurate predictions, making them leaders in advising individuals, businesses, and governments of the opportunities and challenges ahead.

Warren Hatch, CEO of superforecasting agency Good Judgment, explains to VML Intelligence that forecasting is “thinking probabilistically about an uncertain future.” Driven by science and data, “the role of a superforecaster basically comes down to two things: provide the best possible numerical forecast and provide the context for that number so that we can know the drivers to date, the risks going forward, and the factors we should track in the future.”

The *Economist* measured 2024 predictions made by Good Judgment, revealing a score of 4.5 out of 8. Some of the correct forecasts included the election results in Britain, no conflict between China and a Quad power, and the continuation of the Ukraine-Russia war. While not all predictions made by superforecasters are a sure-fire guarantee, they do have a consistent overall accuracy that stands the test of time.

AI may become a challenger in this space, as it too can forecast with predictive AI. Using a combination of machine learning and data analysis, the future is "generated" through pattern identification, trend analysis, and spotting the outliers. And it's getting better—in summer 2024, MIT researchers developed a new approach that claims to improve uncertainty estimates in machine-learning models, called IF-COMP.

Will predictive AI outpace superforecasters? "Perhaps so—that itself is a forecast," muses Hatch. "But the data so far is quite definitive: Professor Philip Tetlock and his colleagues tested many of those models and all of them underperformed the human superforecasters." Although in the long-term Hatch believes it will not be "human versus machine" but rather "a hybrid of humans and machines where we see the most promise to get to the best possible forecast even faster."

Bringing this hybrid to life is California-based company Third Round Analytics Capital (TRAC), which is in the business of predicting the next unicorn. By combining machine learning and superforecasters, TRAC states it "launched to provide founders with a more efficient funding process where investments can be made quickly and hassle-free." The company was officially founded in 2020 and has since claimed to make over 100 investments across various tech sectors.

Why it's interesting

The business of forecasting is beneficial to everyone and it is ultimately about planning. Hatch believes there's untapped potential in most businesses: "Superforecasters are everywhere, but most of them are still undiscovered gems. All organizations would do well to identify and cultivate their own talent and get the best possible wisdom from their crowd."

> SUPERFORECASTERS ARE EVERYWHERE, BUT MOST OF THEM ARE STILL UNDISCOVERED GEMS. ALL ORGANIZATIONS WOULD DO WELL TO IDENTIFY AND CULTIVATE THEIR OWN TALENT AND GET THE BEST POSSIBLE WISDOM FROM THEIR CROWD.
>
> Warren Hatch, CEO, Good Judgment

11

TECHNOLOGY

20

11

DIGITAL SIMPLICITY

People are overwhelmed by information. Brands are responding with simplicity.

Lifeworld, Seoul. Commissioned by CIRCA, @junleephotos © 2024 Olafur Eliasson

Information overload isn't new. Shortly after the printing press was invented in 1440, scholars complained about the sudden deluge of material. So it is with digital. People are still feeling the strain of taking too much (but never enough) in. Seventy-six percent of people say there's too much clutter on most websites these days and 71% are interested in the idea of an "information diet." Now a cadre of brands are creating services that are about stripping back, simplifying, and allowing audiences some much-needed space.

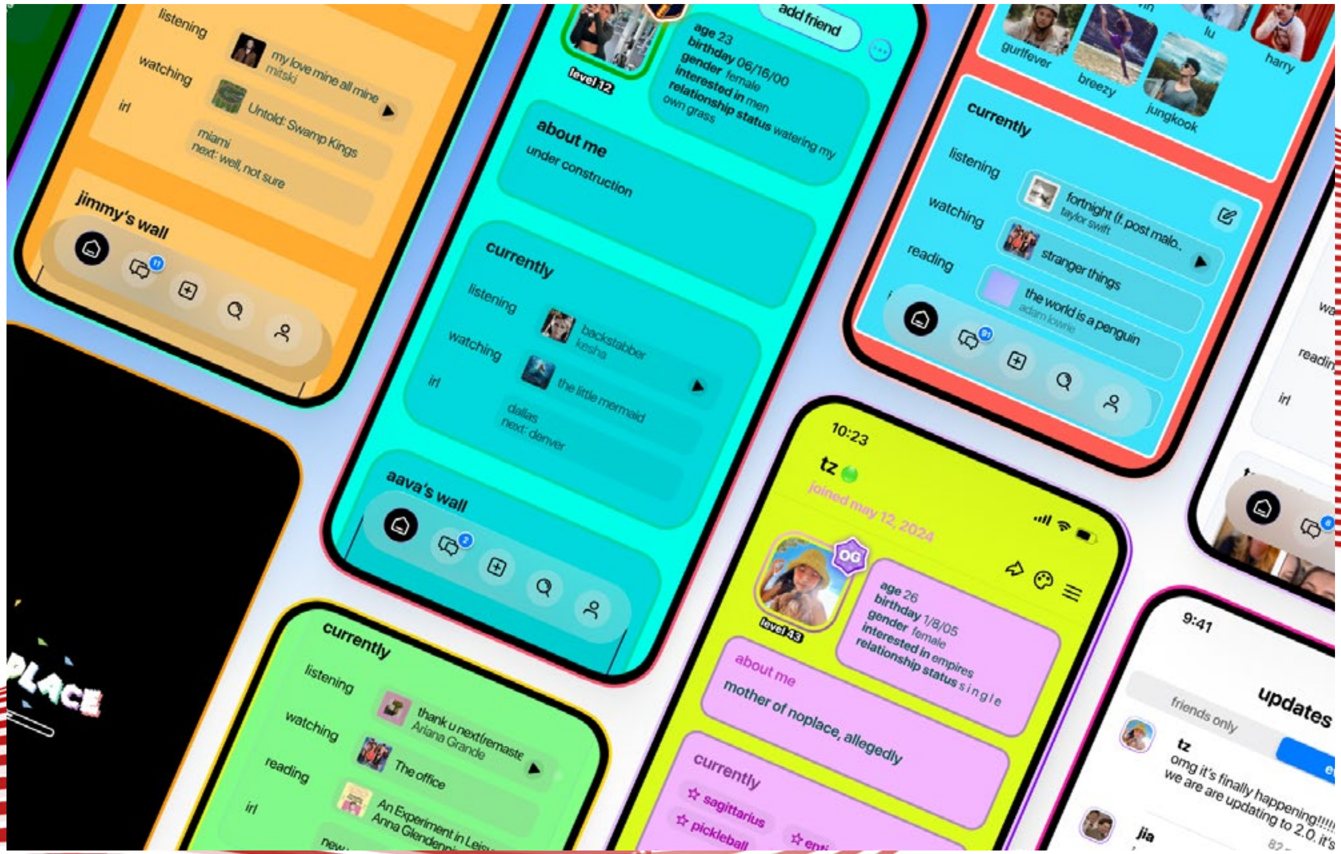
Tom Chatfield is a technology theorist whose latest book, *Wise Animals: How Technology Has Made Us What We Are*, looks at our relationship with digital tools. He warns of the dangers associated with information overload. “It’s easy for every moment of every day to turn into the same kind of semi-distracted time,” he tells VML Intelligence. “More deeply, there can be a sense of disempowerment, of feeling cut off from meaningful understanding and agency, and thus from satisfying, constructive participation in society.

“At its best, however, digital simplicity promises vital forms of agency and freedom: well-contextualized, actionable, and cognitively tractable information environments that offer enough time, space, and autonomy for people to have ownership of their lives.”

With its penchant for minimal design, it’s little surprise that technology giant Apple is ahead in the digital simplicity stakes. Take web browsing, increasingly a clamorous experience where ads, banners, and offers create clutter online. Apple has introduced a feature called Distraction Control for its Safari web browser. This recognizes items that could steal the audiences’ attention and quietly removes them.

Out-of-home advertising contributes to the information glut in cities. In October 2024, Icelandic-Danish artist Olafur Eliasson staged a takeover, swapping commercials for art designed to slow things down, using an atmospheric video called *Lifeworld*. In four major cities—Seoul, London, New York, and Berlin—huge digital billboards showed Eliasson’s majestic artwork rather than advertisements to over-stimulated passers-by. *Lifeworld* also took over WeTransfer’s platform, engaging global users digitally.

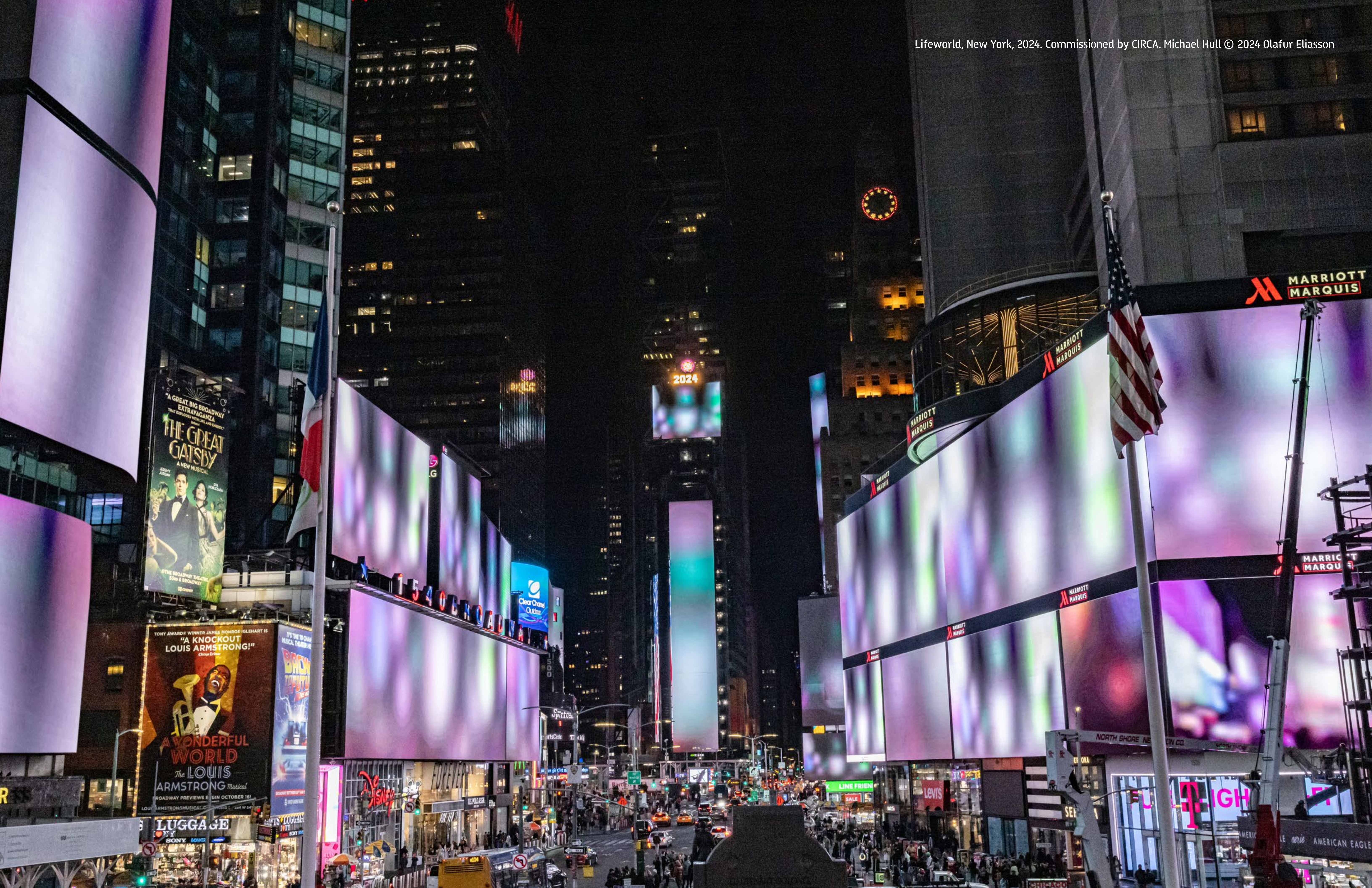
Social media is a major driver of information overwhelm. Apps command attention by offering content in fast, addictive bursts. Noplace, a new platform that launched in summer 2024, promises an antidote to this. Its offer is communicated more on what’s omitted, than what’s included. “Remember how fun the internet was before all the algos and ads?” the app’s own description asks. “We do too… so we’re bringing it back.” Noplace is about people customizing their own profiles and communicating in text only.



Noplace

Why it’s interesting

Businesses bombard people with information and the psychological cost of this is only starting to be understood. Brands that can offer simplicity and much-needed respite will resonate with the 88% of people who wish life could be simpler.

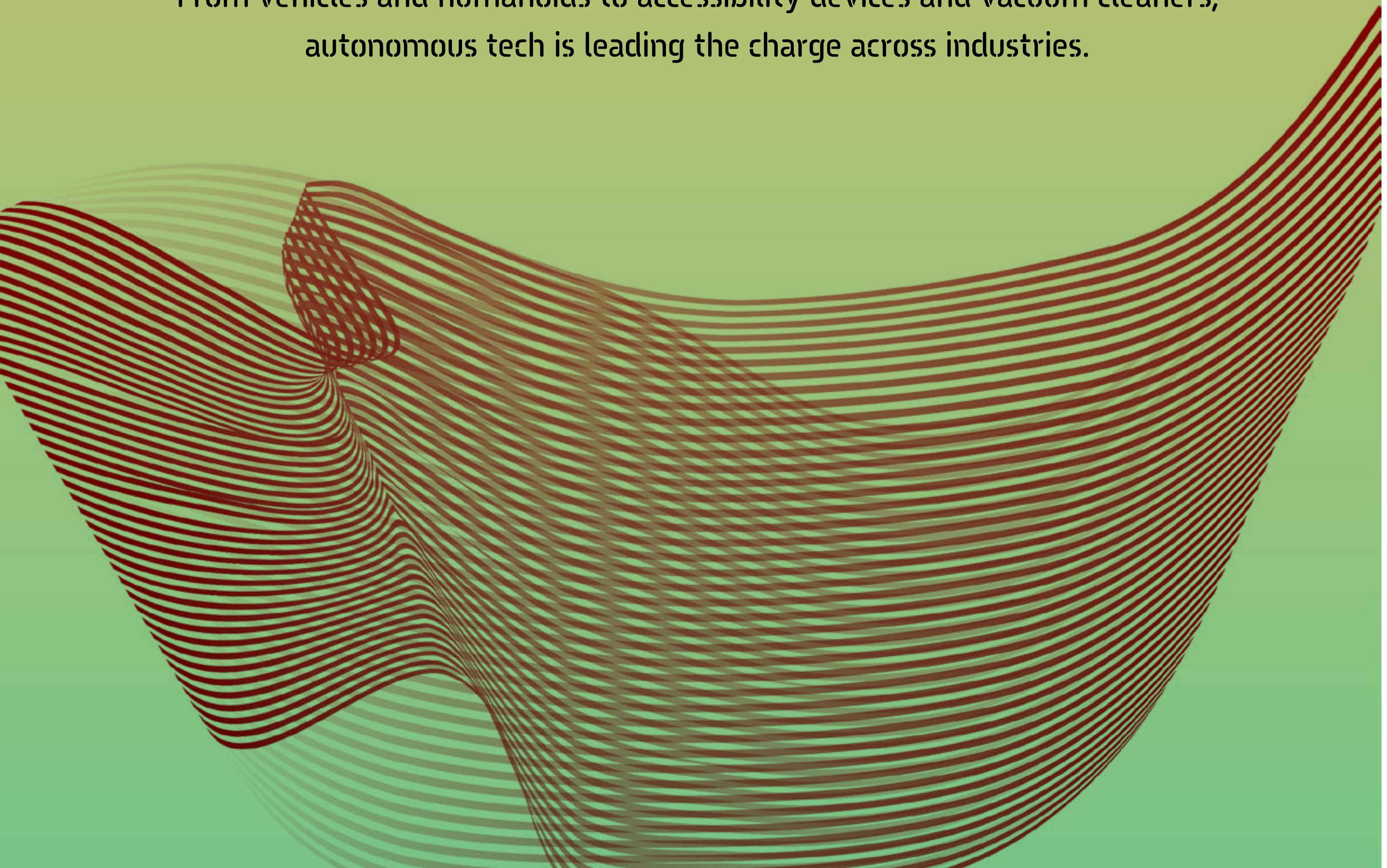

MARRIOTT MARQUIS
2024
"A GREAT, BIG BROADWAY EXTRAVAGANZA"
THE GREAT GATSBY
A NEW MUSICAL
"A KNOCKOUT LOUIS ARMSTRONG!"
A WONDERFUL WORLD
The LOUIS ARMSTRONG Musical
1540 BROADWAY
Clear Channel Outdoor
LUGGAGE
SONY
Disney
FOREVER 21
Levi's
NORTH SHORE
AMERICAN EAGLE

Lifeworld, New York, 2024. Commissioned by CIRCA. Michael Hull © 2024 Olafur Eliasson

12

AUTONOMOUS FUTURES

From vehicles and humanoids to accessibility devices and vacuum cleaners, autonomous tech is leading the charge across industries.



Autonomous innovation was a prominent feature during the 2025 Consumer Electronics Show (CES). During Nvidia's CEO keynote speech, Jensen Huang said, "It is very, very clear, autonomous vehicles have finally arrived," pointing to success from Waymo and Tesla. Waymo posted on X (formerly Twitter) in October 2024 that the Waymo One was already providing over 150,000 paid trips every week and believes the future of autonomous rides is here and growing. McKinsey has predicted autonomous driving could create $300 billion to $400 billion in revenue by 2035.

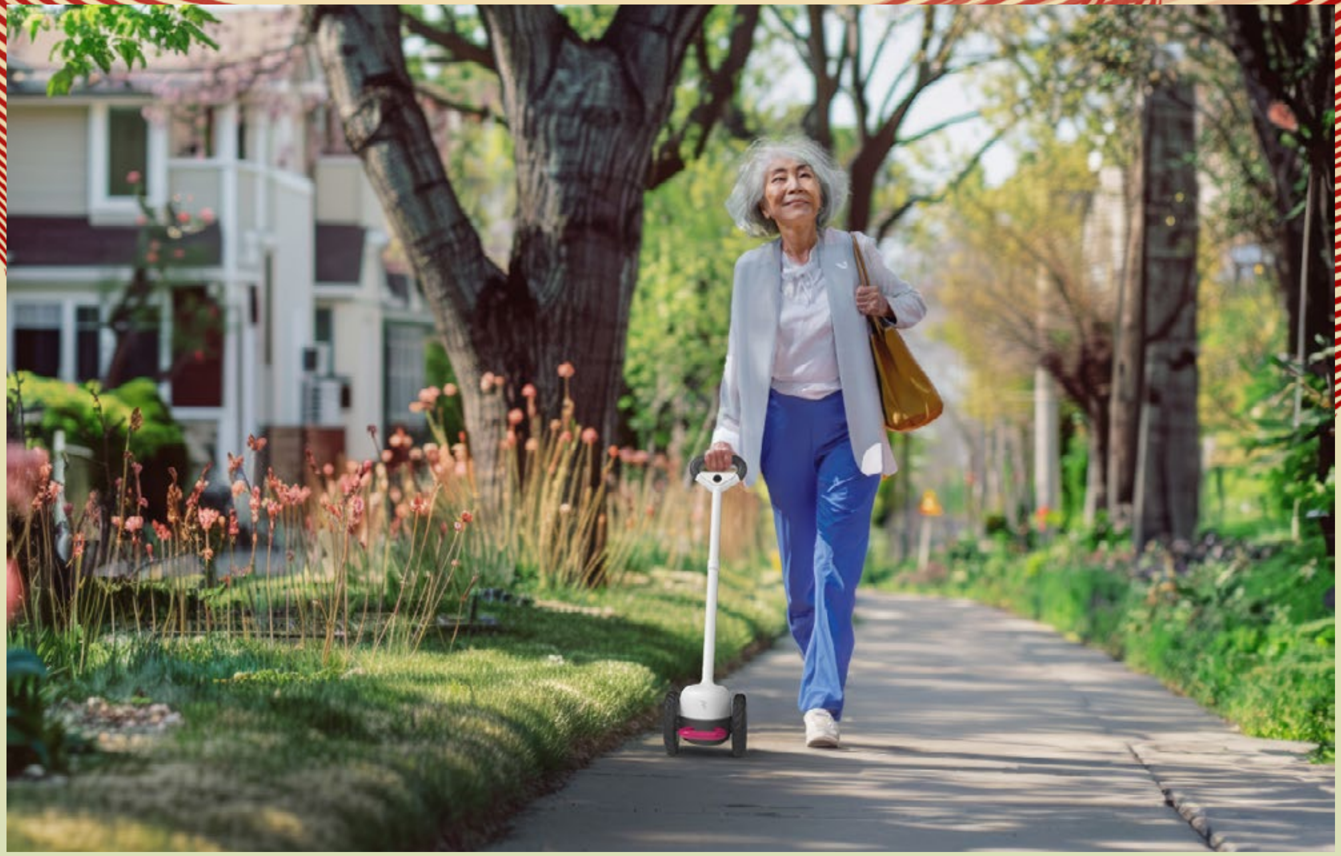
At CES, a broad spectrum of autonomous vehicles and software was on show. Japanese mobility company Tier IV showcased its autonomous bus, featuring "a new data-sharing platform designed to scale the development of autonomous driving AI." Zoox gave live demos by providing robotaxi rides to and from the show in Las Vegas. John Deere showed off the scale of its autonomous vehicle capabilities with several new transportation innovations across agriculture, construction, and

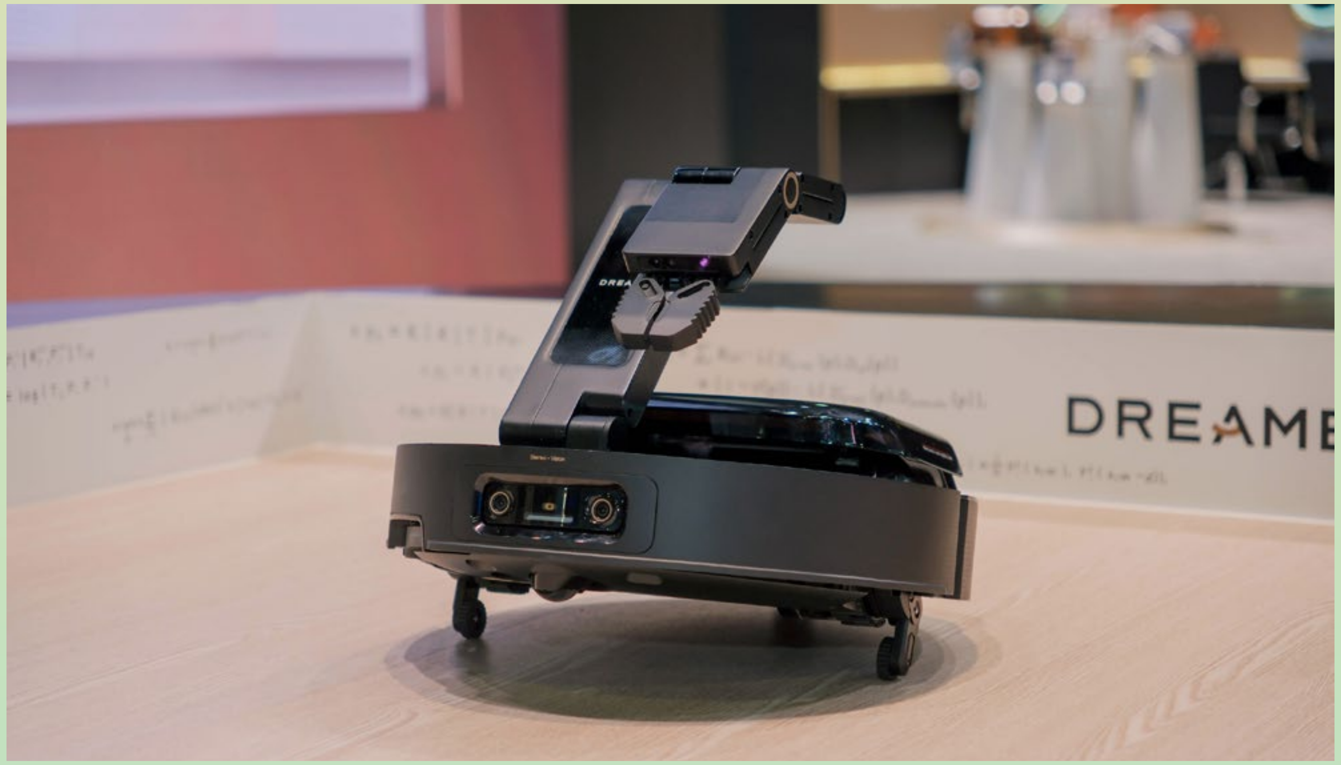
Zoox robotaxi in Las Vegas. Courtesy of Zoox commercial landscaping. The Consumer Technology Association (CTA) CEO and vice chair Gary Shapiro believes that “autonomous vehicles are reshaping mobility.”

Autonomous tech is also supporting other sectors. Aiding the blind and low-vision community is Glide by Glidance, a mobility aid embedded with Glidance’s Sensible Wayfinding technology, which autonomously guides the user with seamless ease and comfort. CTA futurist Brian Comiskey says Glidance is “a company adapting vehicle technology into a solution to bridge a gap in care.” Glide is currently undergoing beta tests and is available for consumer preorders in 2026.

The home is also getting a massive upgrade, with smarter and more intuitive cleaning robots such as Roborock’s latest vacuum cleaner, the Saros Z70, which not only features the new StarSight Autonomous System 2.0 for more precise navigation and mapping, but also has a robo-arm to pick up stray socks and the like. Similarly, Dreame’s X50 Ultra robot vacuum is the first of its kind with lifting wheels to navigate uneven surfaces and stray obstacles. It is officially launching in February 2025. For those with pools, Beatbot unveiled its AquaSense 2 Series, embedded with advanced AI-navigation and also available for purchase from February 2025—humanoid helpers en masse at CES showed off its advanced capabilities (for more see Robot redux, page 53).

Why it’s interesting:
The age of autonomous everything has arrived. Having the foresight to embed autonomous technology into robots will be part of a future that builds ease into consumers’ lives, allowing them free time to do more of what they want.



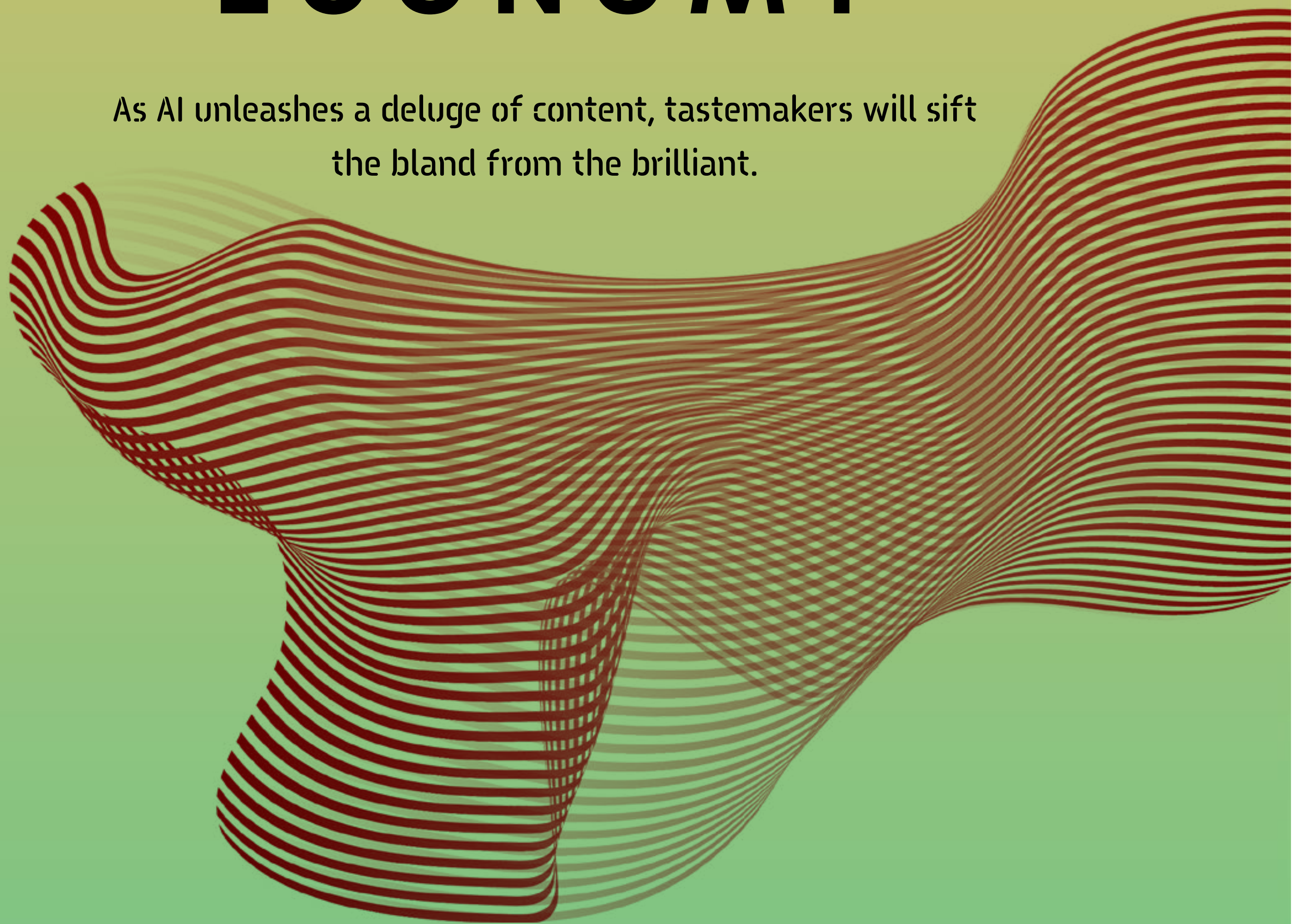


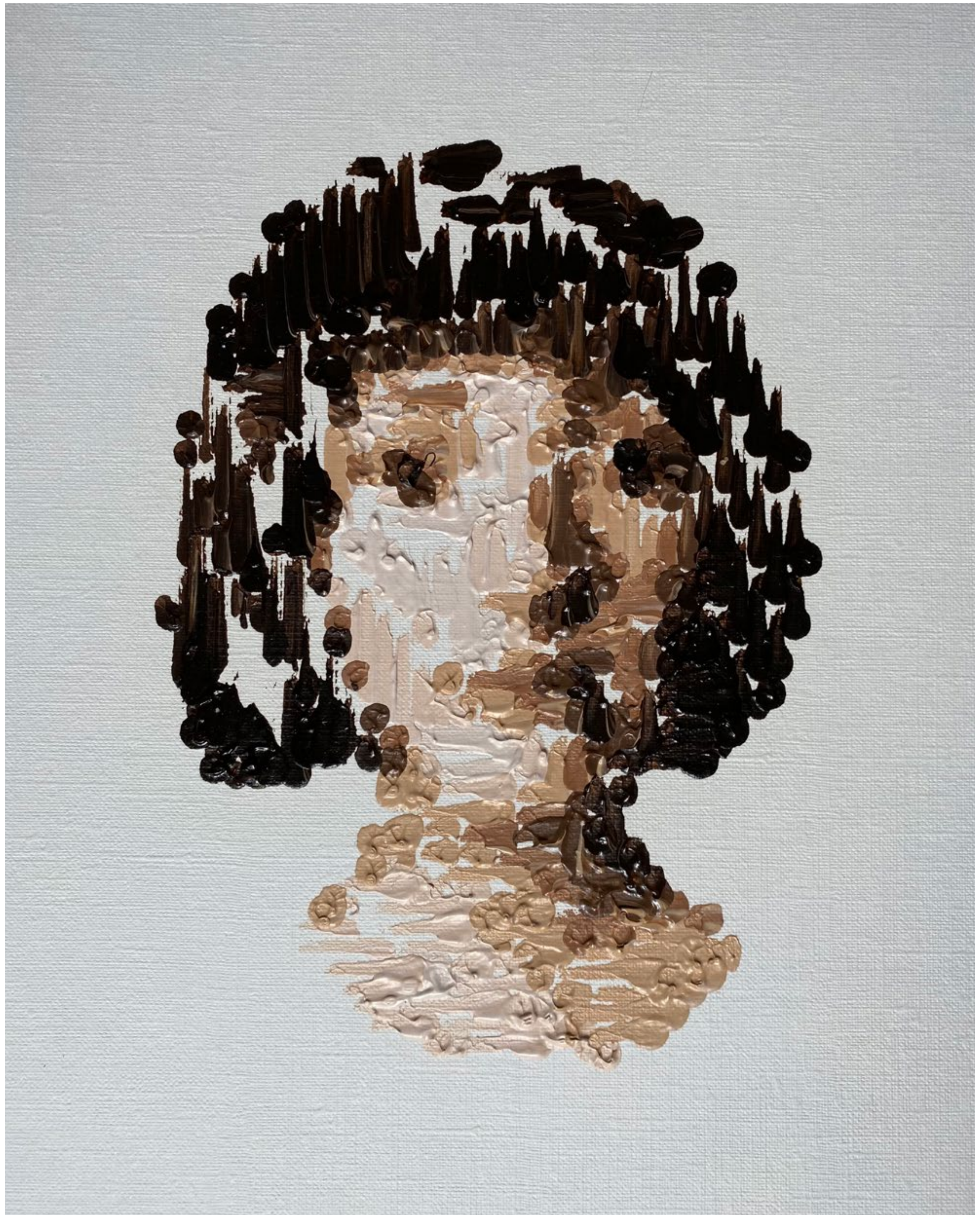
Above top: Glide by Glidance
Above: Dreame X50 Ultra robot vacuum

13

THE CURATOR ECONOMY

As AI unleashes a deluge of content, tastemakers will sift the bland from the brilliant.





Self-portrait with new arm, by AI robot painter Ai-Da

A painting of the English computer scientist Alan Turing, considered the "father of AI," sold at Sotheby's New York in November 2024 for more than $1 million. The artist was an AI-powered humanoid robot called Ai-Da.

Ai-Da is an advanced example, but AI tools are rapidly democratizing the creative process, meaning anyone can create decent imagery or spin up a tune without ever having to learn to paint or play an instrument. AI adoption is moving fast: 43% globally have used generative tools to create artwork and more than a third of people have done the same to make music.

In this era of generative creativity, AI "artists" like Ai-Da are provoking a dilemma. If machines are taking over the creative process, what does this mean for human artists? Some see the emergence of AI as blurring the lines between creator and curator. Where once artists and creators needed craft skills, now the artist's role is increasingly about taste, curation, and refinement—becoming a decision-maker who guides and prompts the tools.

In a piece on his website, design leader Andy Budd argues that the shift from maker to curator is inevitable. Designers, he says, will "increasingly be seen as arbiters of taste and ethics within a landscape where anyone can create a design, but not everyone can discern what makes it meaningful."

At the 2024 AI Summit London, a group of artists gathered on stage to discuss authorship in the face of such tools. LA-based music producer Fernando Garibay said: "We have to decouple our identity from our output… that will no longer serve us." Musician Daniel Bedingfield, who demonstrated live just how easy it is to create music using AI tools like

> AI IS JUST A TOOL, AND PEOPLE'S AMBITION ALWAYS OUTSTRIPS THEIR RESOURCE.
>
> Ali Hossaini, multidisciplinary artist, engineer, and philosopher

Udio, agreed, predicting that "we are all about to undergo an individual and collective ego-death."

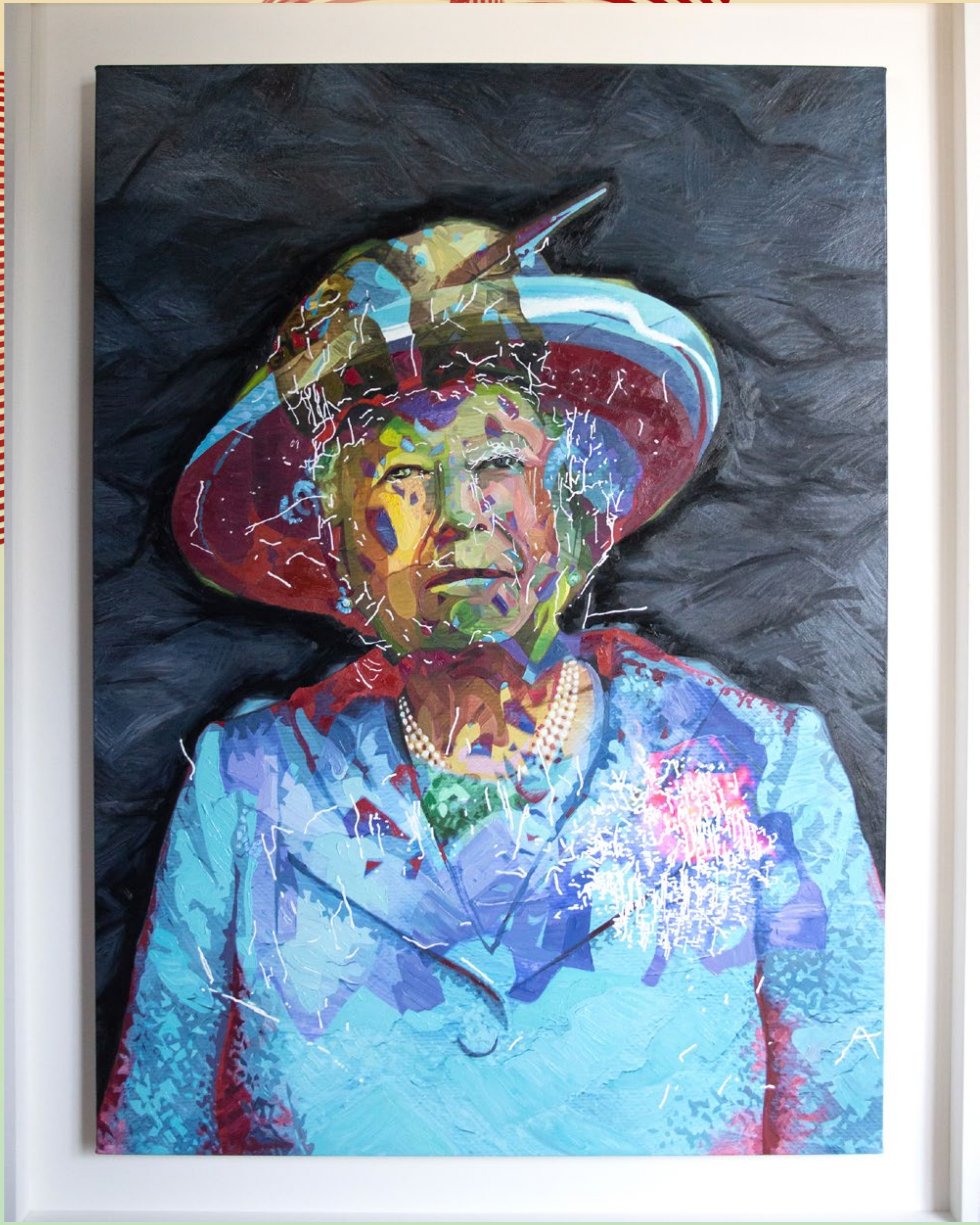
Multidisciplinary artist, engineer, and philosopher Ali Hossaini spoke at the same AI Summit panel. He does not agree that AI will relegate artists into a curatorial role. "Craft is now getting easier to access through digital tools, but only in digital media," he tells VML Intelligence. "And let's remember life doesn't just happen online." As he points out, we're all tastemakers now anyway, thanks to social media. He also questions whether machine-produced work is genuinely creative. "Statistical inference isn't creativity. At the height of creative arts, we want fresh experiences—grooves, beats, styles, and looks we've not seen before. I think we'll place increased value on improvisation, imperfection, and finding a new twist on things."

Hossaini's view reflects recent artist frustration over copyright infringements. In the music industry, lawsuits are raging as Sony Music, Warner Records, and Universal Music Group sue a pair of AI music startups which were alleged to be training their models with protected material. The record labels are claiming likely ruinous damages of $150,000 per infringement against Suno AI and Uncharted Labs Inc, the developer of Udio.

Only 37% of people say they would happily purchase music performed by AI rather than humans.

AI will allow more people to create (see *Made by humans*, page 115), but this won't diminish the role of genuine creators, says Hossaini. "AI is democratizing creative production, but it's just a tool, albeit one that

AI robot painter Ai-Da



empowers more people than paintbrushes or electric guitars. I think creativity—defined as making something new—will remain the province of people who have the tremendous motivation, drive, and innate talent." Ultimately, he says, he's optimistic: "AI is just a tool, and people's ambition always outstrips their resource. You can do more with AI, but people always want even more. We'll have the same people doing more with new tools."

Where curation will be needed is in sifting through the flood of output that will inevitably result from the availability of new tools. Audiences are already getting bored with algorithm-generated recommendations, which some believe are having a homogenizing effect, causing us all to gravitate towards the same tastes. Digital tastemakers will emerge to help us navigate "visual exhaustion" or "the age of average."

Jon Carney is CEO of Warm Storm, a company that helps brands with social campaigns. He thinks that we are at the start of the curator economy. "Influencers provide their audiences with a unique perspective on specific cultural niches," he tells VML Intelligence. "The influencer economy, now valued in the tens of billions, has surpassed traditional Hollywood or TV celebrities as the go-to source for inspiration and guidance. Far from fading, the role of influencers is evolving and becoming increasingly sophisticated."

Why it's interesting

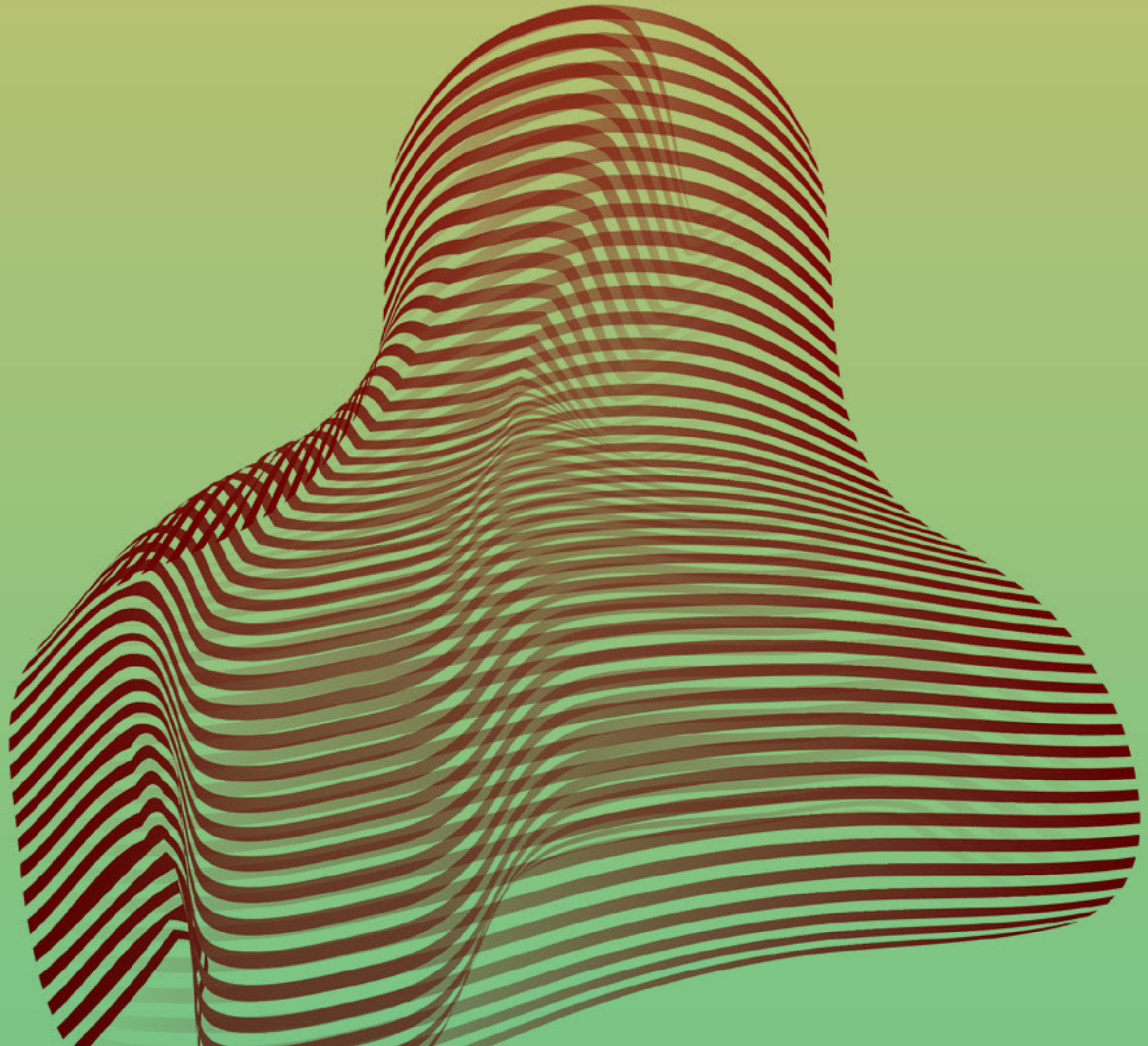
Will AI nudge humans into the role of curator, not creator? Much depends on your definition of creativity. Nevertheless, there will be a growing appetite for the unexpected from tastemakers, experts, and mavens, from audiences who feel trapped in a lifestyle foisted on them by an algorithm.

Algorithm Queen, created by AI robot painter Ai-Da

14

ROBOT REDUX

Make room for humanoid robots—they could soon be a staple in all homes.



It might be the most unsettling sci-fi cliché of all, but it's drawing inevitably closer. Humanoid robots are coming to factories, offices, cities, and—possibly—homes in the coming years. Mechanical companions will assist with the drudgery that most of us would rather avoid, like hefting items around in a house move, administering medication to aging (and cranky) seniors, or simply keeping up with the cleaning.

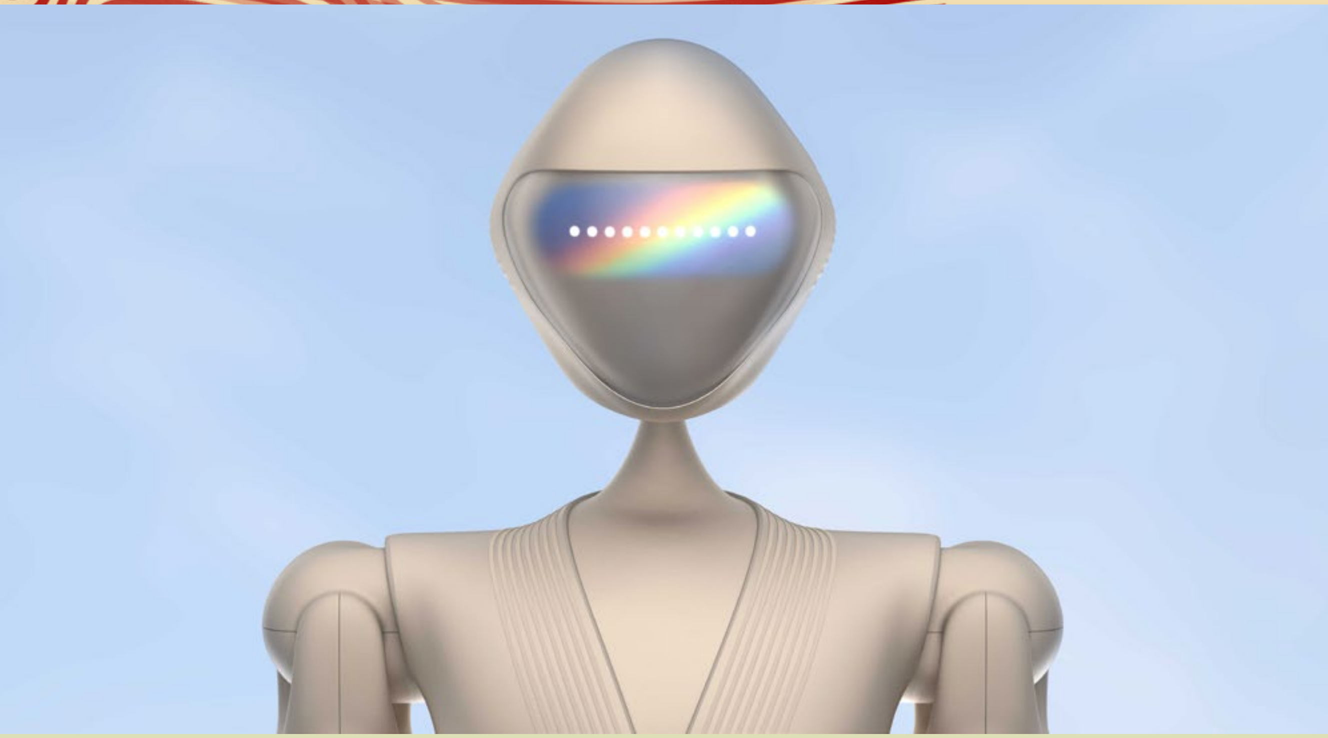
Humanoid robots as a serious consumer category became realer when Tesla, a company more recognized for its electric saloons, announced that its robot Optimus will be in production in 2025 and available for purchase in 2026. During an October 2024 event, the robots appeared uncannily competent. They seemed to work the room, hobnobbing with guests. One was clad in a cowboy hat and ordered to serve drinks at the bar. "I think this will be the biggest product ever, of any kind," said Tesla founder Elon Musk. The CEO neglected to mention that the demonstration robots weren't acting autonomously, but were being remotely controlled by humans hidden behind the scenes, according to a report by *Bloomberg*. Nevertheless, Musk anticipates Optimus working in his factories as early as next year.

A great leap forward for robotics came earlier in 2024 when Stanford University released its Aloha paper. This research revealed that robotics systems will need far less data than previously expected for training. Hussein Kanji, a Stanford alumnus and founder of investment firm Hoxton Ventures, believes that this discovery will increase the rate of advancement for the category.

"Unlike large language models, which can train on everything that's written or image systems which can also train on very wide image libraries, robots have to train with real-world data," Kanji tells VML Intelligence. "We don't have people walking around with 24/7 recordings of movements to give to robotic models to teach them. The Aloha paper shows we don't need nearly as much data as we thought to build compelling robotics. For consumers I think we're still several years away from these deployments. The bigger place for robotics will be behind the scenes in more industrial settings."

And with a focus on safety, 1X, a robotics company backed by OpenAI, released a video teasing its new humanoid, Neo. "Safety is the cornerstone that allows us to confidently introduce Neo Beta into homes, where it will gather essential feedback and demonstrate its capabilities in real-world settings," says Bernt Børnich, 1X CEO.

Humanoid helpers were en masse at the Consumer Electronics Show (CES) 2025, showing off their advanced capabilities, with brands such as Nvidia providing physical AI systems to power humanoid robots. On display included Apptronik's Apollo humanoid robot performing an array of industrial tasks including heavy load pick-ups and assisting with assembly lines. Meanwhile, on a mission to make robots more lifelike is Realbotix's Aria, a modular system that promises to allow people to build their own robots. Its "next-generation ultra-realistic humanoid robot" first stepped out at CES. It arrives at a time when 44% of global gen Zers say they could see themselves falling in love with a chatbot/AI, suggesting the future of Aria could be the start of synthetic relationships for the younger generation.



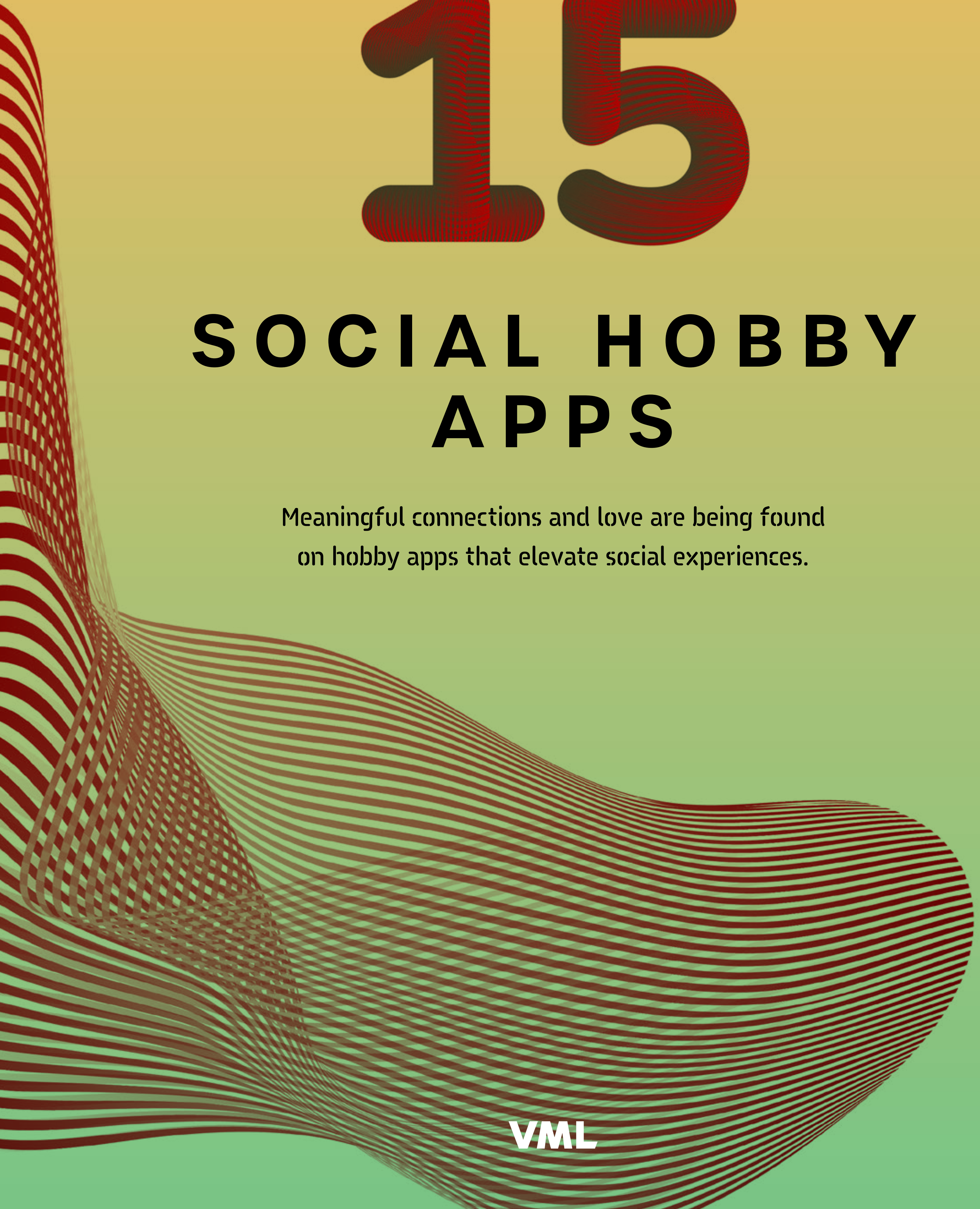
Why it's interesting

Investment is pouring into humanoid robots as their potential is recognized for production facilities, workplaces, and the home. Cardenas predicts that in the future, every house will have a robot.

Kind Humanoid

14

Optimus by Tesla

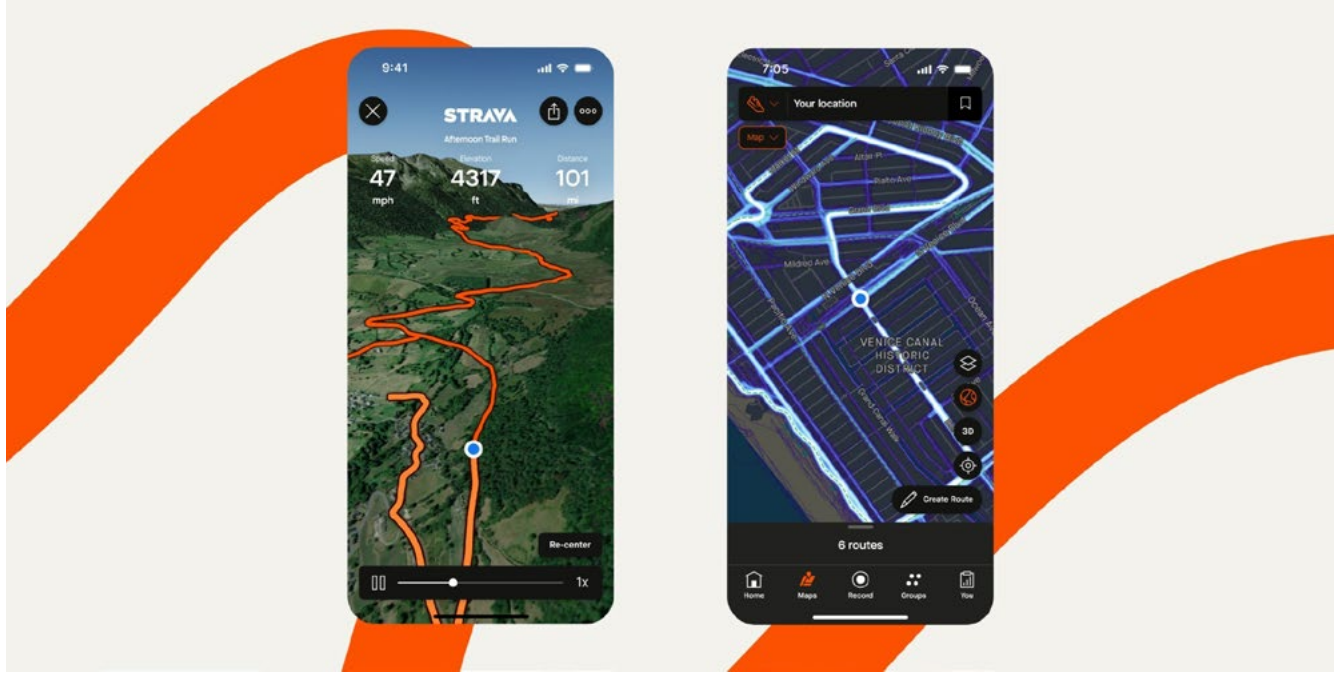


15

SOCIAL HOBBY APPS

Meaningful connections and love are being found on hobby apps that elevate social experiences.

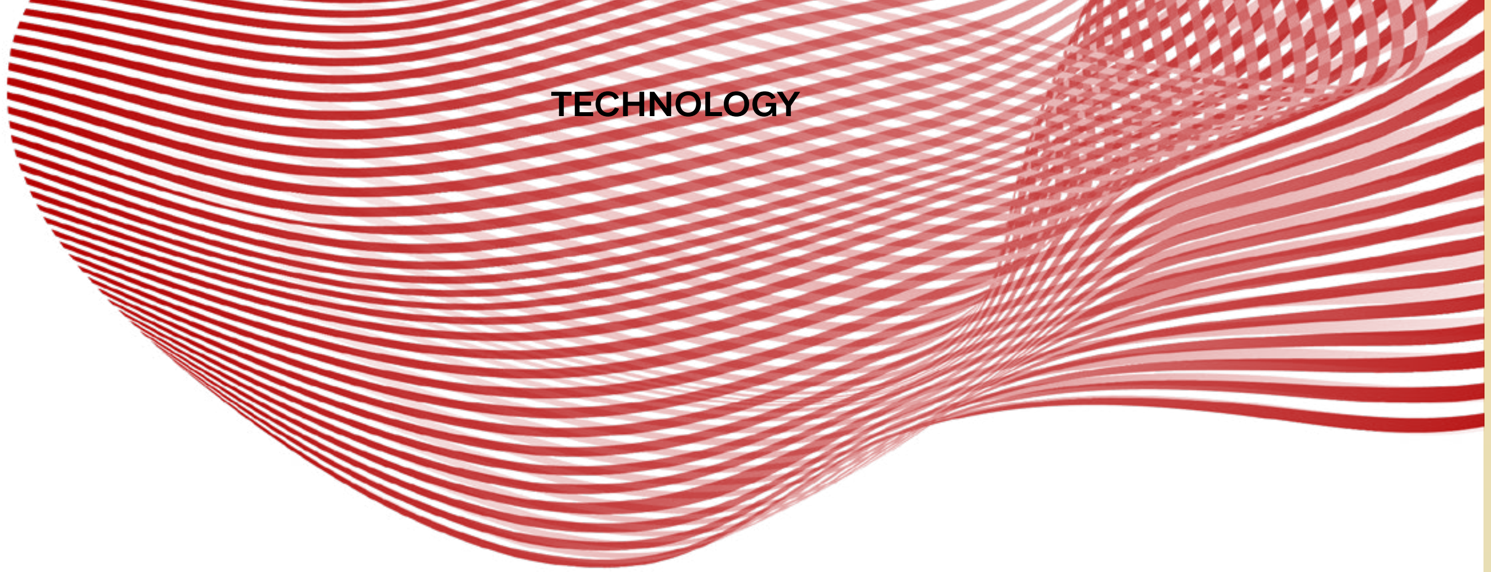
VML


STRAVA
Afternoon Trail Run
47 mph
4317 ft
101 mi
Re-center
Your location
VENICE CANAL HISTORIC DISTRICT
Create Route
6 routes

Strava

People are moving away from larger social media platforms and turning to smaller, focused hobby apps such as AllTrails for hiking, Strava for fitness, Airbuds for social music listening, and Letterboxd for cinephiles. These apps support the 67% of individuals globally who are making or maintaining more effort to meet new people. By transforming personal interests into social, connected experiences with likeminded people, hobby apps offer deeper connection. So when Strava, which has 125 million members in more than 190 countries, introduced a direct messaging app in December 2023, some people started using it to find dating partners.

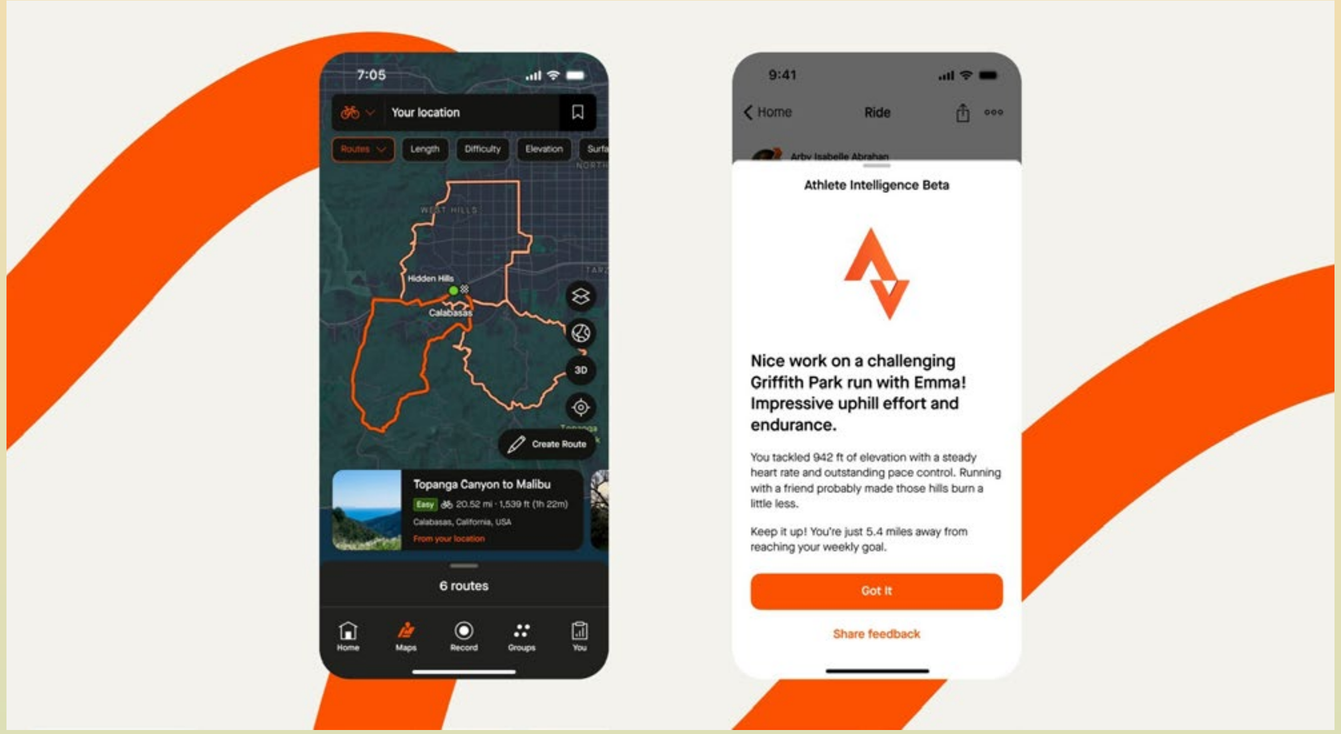
Bigger platforms such as Facebook, Snapchat, and TikTok have become impersonal spaces flooded with corporate, paid-for content, whereas smaller, apolitical, less divisive hobby apps mimic how we interact socially as human beings—in smaller numbers.



70% SAY TECHNOLOGY BRINGS PEOPLE TOGETHER.

Seventy-one percent of people say technology gets in the way of human connection (although equally 70% say technology brings people together).

“From day one, we have always been very concerned with what creating a community online looks like, and how to keep it feeling good,” a spokesperson for Letterboxd tells VML Intelligence. The company allows film lovers to log, review, and discuss movies, building communities around shared tastes, a formula that has taken off. Letterboxd hit the 16 million user mark in October 2024, an increase of 2.7 million since March the same year. “Hobby apps are an excellent way to track one’s personal progress, but Letterboxd is as much about fostering a collective cultural experience, which we are seeing play out in the real world as young cinephiles join film clubs and sell out repertory screenings at their local art house cinemas,” says the app’s spokesperson.



Topanga Canyon to Malibu
Easy 20.52 mi · 1,539 ft (1h 22m)
Calabasas, California, USA
From your location

Athlete Intelligence Beta

Nice work on a challenging Griffith Park run with Emma! Impressive uphill effort and endurance.

You tackled 942 ft of elevation with a steady heart rate and outstanding pace control. Running with a friend probably made those hills burn a little less.

Keep it up! You’re just 5.4 miles away from reaching your weekly goal.

Strava

Because hobby apps weren’t explicitly designed for dating, users feel less pressure to advertise themselves and, without that weight of expectation, connection with a tribe of people with shared interests comes with a feel-good factor. Seventeen percent of millennials use hobby apps to meet new people in the hopes of finding a date. In a climate where the use of dating apps is on the decline—market leaders Match Group and Bumble have lost more than $40 billion in market value since 2021—hobby apps are not only attracting people in droves, but also helping some find love.

Why it’s interesting

People are seeking more meaningful digital interactions. Smaller, focused apps that connect us with like-minded people enhance real life, while fostering passions and elevating hobbies from solitary pursuits to collective endeavors.

16

RISE OF MICRO EVS

Zipping around and parking in crowded cities are becoming easier with inventive, design-led tiny electric vehicles.

Among the latest launches to enter the tiny electric vehicle (EV) fray is the Mibot from Japanese company KG Motors. The company calls this single-seater EV a “minimum mobility” vehicle whose development has been driven by data that a large proportion of car journeys in Japan are taken alone, Startup Selfie reports. With its ultra-compact design inspired by the look of 80s Polaroid cameras, it’s priced at ¥1 million, around $6,700, and is set to enter the market in 2025.

And from the Swiss Ouboter family behind the Micro range of scooters comes the Microlino tiny electric vehicle. This two-seater car, inspired by 1950s bubble cars, was conceived to answer the question, the brand says, of “how much car do you really need?”

Before Microlino’s Spiaggina launch, Fiat Topolino revealed an edition designed by Italian motor atelier Castagna Milano, the Fiat Topolino Spiaggina. In June 2024, Korea’s Hyundai launched the Hyundai Inster, described by the manufacturer as “ideal for city driving” and designed to “boost convenience when parking.”

The tagline for Israeli company City Transformer’s tiny EV is “drive like a car, park like a motorcycle,” as its wheels contract when it’s in city mode, to fit into smaller spaces. In September 2024 the company unveiled its new CT-2 model, available to pre-order in Europe. And in China, the Wuling Hongguang Mini, launched in 2020 has become the country’s most popular EV, selling more than 1.2 million units in under four years.

During the Consumer Electronics Show 2025, a new generation of micro EVs were on display including Aptera, a two-seater, three-wheeled, sun-powered car. Covered in solar panels, Aptera can drive up to 40 miles

per day using solar power, with a range of 400 miles if fully charged through an electrical source. Currently in the prototype stage, the Californian company claims to have all the resources required to go into full production.

These tiny EVs currently only make up a small proportion of electric vehicle sales, Elizabeth Connelly, energy technology and transport analyst at the International Energy Agency, tells VML Intelligence. She notes that "electric mini-vehicles, or quadricycles [the category into which the Topolino and Microlino fall] represented less than 0.2% of electric car sales in 2023—about 25,000 were sold." But cute looks alongside practicality and affordability mean that percentage could be set to rise.

Why it's interesting

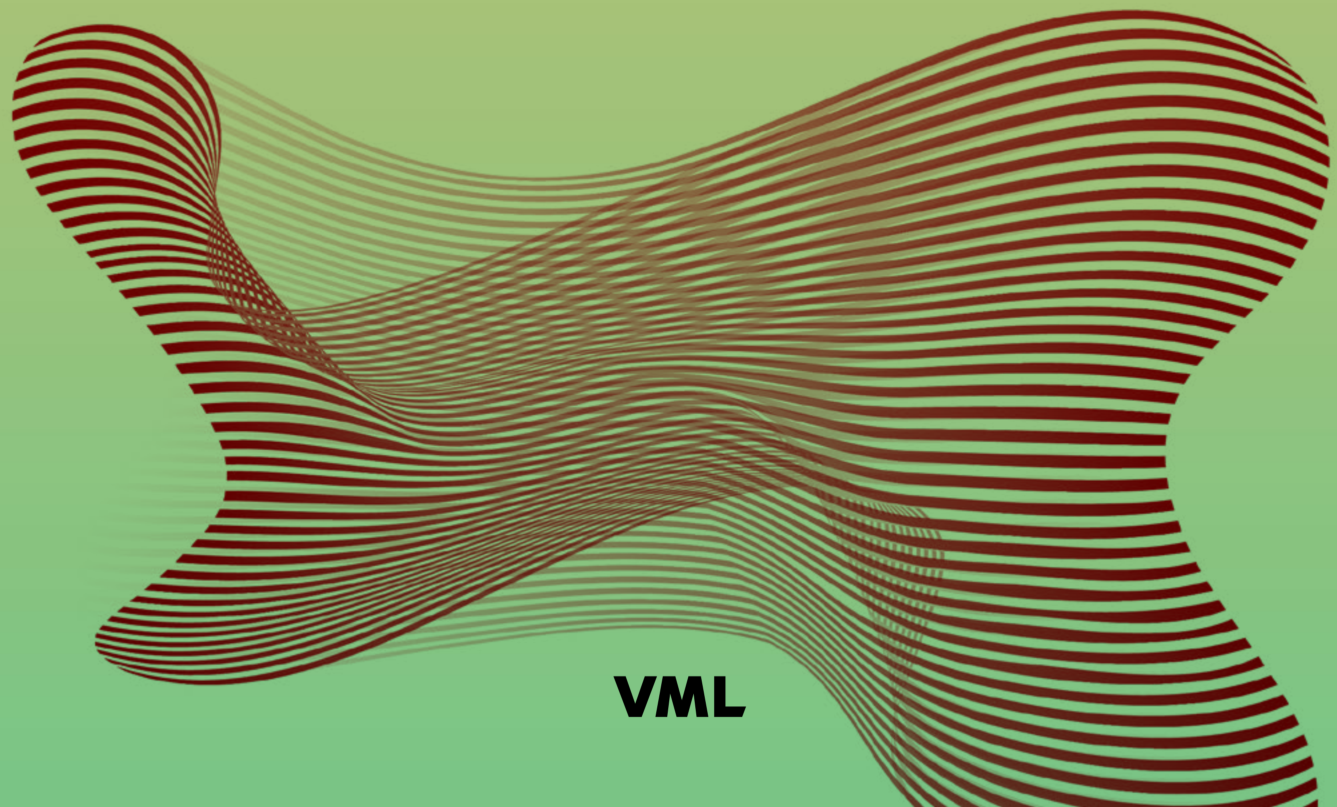
While their numbers are small, the growing number of new, inventive launches in the tiny EV category illustrate that for some customers, these vehicles provide a convenient—and more environmentally friendly—solution for city driving.

Above: Microlino Spiaggino. Courtesy of Microlino
Right: MiBot. Courtesy of KG Motors

17

SMART GLASSES 2.0

Once the preserve of Silicon Valley insiders, smart glasses come into focus for the broader market.



VML

Smart glasses look poised to enter the market as the next meaningful interface thanks to a slew of new launches. According to Grand View Research, the global smart glasses market was worth $1.93 billion in 2024 with a predicted CAGR of 27.3% from 2025 to 2030. While they're unlikely to render your smartphone or laptop obsolete, smart glasses will enter the device mix this year.

But what will they actually do? Most forecasters describe a perspective where the wearer's vision is overlaid with data, directions, media, and infographics. These range from a live health diagnostic to proximity to a destination. Some foresee a future where pop-up ads are bombarded straight to the cornea. A more realistic vision is being created by Journey Lens by Phantom Technology, a device launching in 2025 that promises a

Halliday

light augmentation to the physical world. Its non-intrusive interaction design will assist rather than interrupt.

In a similar vein, startup Halliday debuted its AI eyewear at the Consumer Electronics Show 2025, a pair of frames equipped with DigiWindow technology, a first-of-its-kind, near-eye display that beams information into the user's field of vision without the need for a lens. The glasses also come with a proactive AI agent that tracks conversations, answering questions and offering unprompted assistance. Other features include live translation in 40 languages, voice-to-text note taking, and live teleprompting for effortless public speaking. Others are vying to lead in the AI glasses market too, including Snap, Meta, and, in China, Baidu's Xiaodu.

Aiming to read emotional states, UK-based Emteq Labs plans to roll out a pair of glasses called Sense, featuring an array of sensors that track the facial expressions of the wearer. The innovation allows the company to track data around how facial expressions and emotional states are linked to health.

Will smart glasses sell? The signs are promising. Glasses are something billions already wear, which may smooth the path to adoption, especially as the new wave of smart eyewear aims to offer style as well as function. Ray-Ban Meta glasses appear to be a digital camera and a music player wrapped into a pair of the eyewear brand's classic frames. They currently have none of the augmented reality functions expected from later generations, but still prove popular. EssilorLuxottica, Ray-Ban's parent company, reported that the Meta frames are the top selling product in 60% of its EMEA stores.

Leon Urbonas
CAPTURE
THE NEXT GENERATION OF SMART GLASSES
Ray-Ban
Meta

Ray-Ban Meta smart glasses. Courtesy EssilorLuxottica

Some have raised concerns over the privacy risks of smart glasses. The story of two Harvard students who hacked Meta's Ray-Bans by pairing them with facial recognition software and were able to identify complete strangers garnered a lot of alarmed coverage. Yet privacy risks have long stalked technology, and many will likely reason that surveillance is already all-pervasive and the convenience outweighs the risks: more than half of people (54%) even say they would be willing to share their biometric data if it makes their life easier.

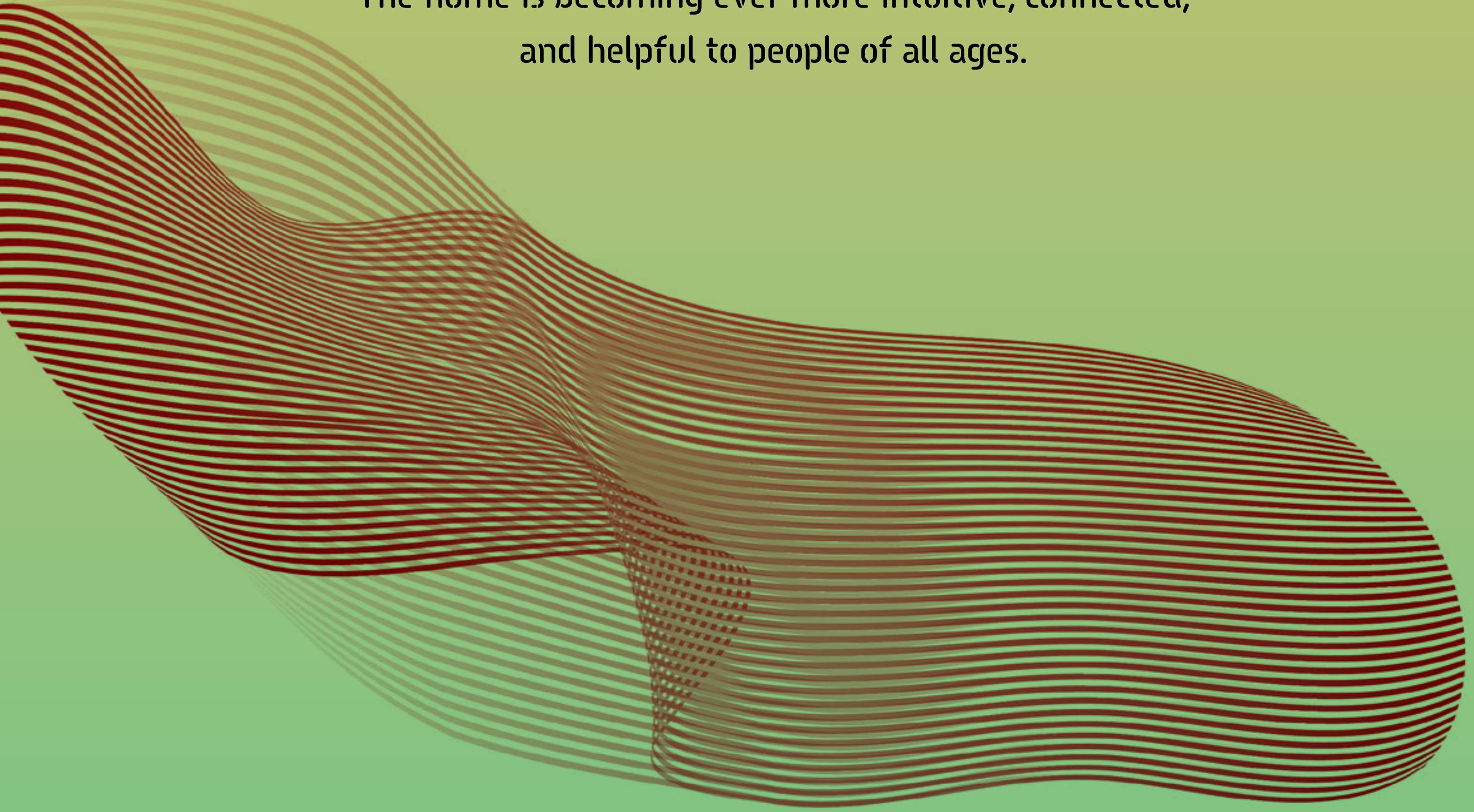
Why it's interesting:

Smart glasses will make a meaningful entry into the devices market, but they won't unseat other interfaces. For creative brands, they represent a new medium in which to design experiences and better connect with consumers.

18

THE CONNECTED HEARTH

The home is becoming ever more intuitive, connected, and helpful to people of all ages.



A household that could organize itself is a dream that might be nearing reality. Panasonic Well announced Umi at the Consumer Electronics Show 2025—a digital assistant that the company calls a "family wellness platform and coach." Umi aims to build stronger families by creating healthy habits, bettering communication, and simplifying organization. Umi will be available in the United States in 2025. Ohai.ai's AI virtual assistant, O, debuted in 2024, aiming to "revolutionize home and personal organization, alleviating the mental load of Chief Household Officers."

For parents, an innovation from Philips uses a monitor to replicate watching over a sleeping baby and checking that they're breathing easily. The Philips Avent Premium Connected Baby Monitor, unveiled in October 2024, employs Philips' SenseIQ sleep and breathing tracking technologies, which analyze millions of pixels every second. UniWhale, showcased at the Consumer Electronics Show 2025, dubs itself "the world-first AI-driven baby care system," measuring vital signs in real time and operating as a personalized digital companion.

Settling a baby gets the tech treatment, too, with Glüxkind's Rosa smart stroller. In Rock My Baby mode, the stroller automatically rocks gently back and forth, streaming white noise to lull the baby to sleep. The company will soon add an adult facial recognition system, to authorize who can access the stroller.

Elli.Q is an "AI care companion robot" from Israeli company Intuition Robotics that aims to help elderly people to live independently for longer (see Age tech, featured in "The Future 100: 2024"). Its developers say ElliQ

acts “like a real roommate,” asking questions, suggesting activities, and providing reminders. The AI learns more about the person as it’s used, to make interactions more personalized over time.

Why it’s interesting

Smart home tech is being designed for every generation, affording people greater independence and free time. Brands too can play a part in making lives easier via thoughtful products, services, and tech-enhanced innovations.

Rosa smart stroller by Glüxkind

SMART HOME TECH IS BEING DESIGNED FOR EVERY GENERATION, AFFORDING PEOPLE GREATER INDEPENDENCE AND FREE TIME.

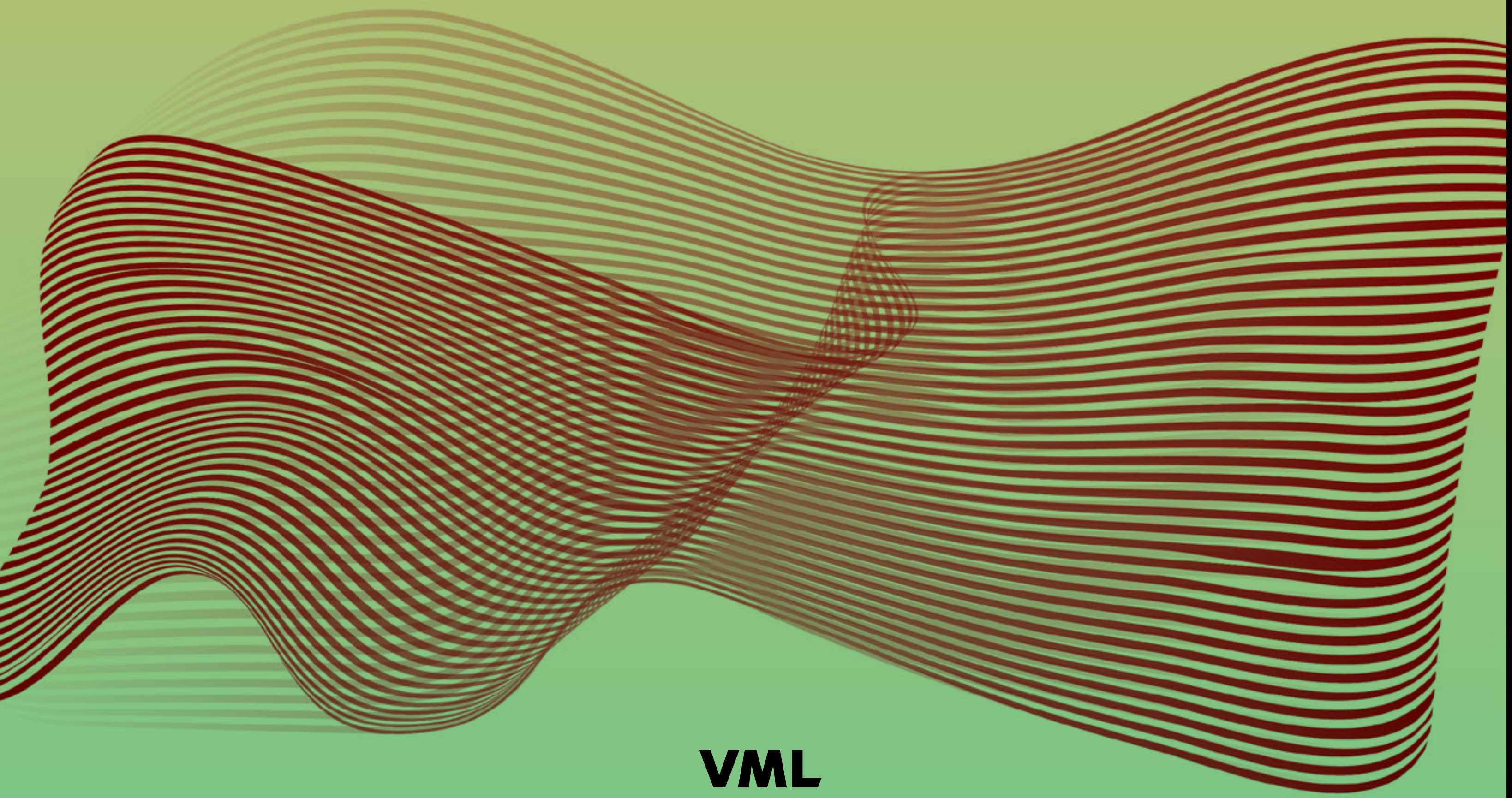
Video
70.3°F
Deep sleep
In bed: 2hr 14min
41 Breath/m
PHILIPS AVENT
Noah
Sleeping deeply
PHILIPS AVENT

Avent Premium Connected
Baby Monitor by Philips

19

SHARED REALITIES

Emerging technologies that don't require headsets are unlocking a new era of shared experiences which blend different realities in real time.



Cosm Experience Center

Immersive technology, media, and entertainment company Cosm has launched two experiential venues in Los Angeles and Dallas to offer sports fans a shared reality experience that spans the virtual and physical worlds. Perched on stadium seating in front of 87-foot-diameter, 12K+-resolution LED curved domes, fans are transported to the sidelines of their favorite football field or the UFC Octagon via the state-of-the-art experience, which president and CEO of Cosm Jeb Terry says will "redefine the way the world experiences content."

Future Stores in London's Oxford Street brings shared reality technology into the retail space. Four hundred square meters of micro LED displays and monumental billboards cover the walls and ceiling to immerse consumers in the resident brands' worlds. Founder and chair Ariel Haroush describes it as: "an electrifying blend of creativity, technology, and multisensory design that feels like stepping into the future."

In Japan, NHK Science and Technology Research Laboratories is researching a new technology that will enable shared 3D experiences without the need for special glasses. Stereoscopic vision technology, currently a prototype, would use layers of overlapping pixels on digital screens to create a 3D experience from all angles. A similar multipixel effect is used by Misapplied Sciences' Parallel Reality screens to enable personalized messaging and wayfinding to different people at the same time, based on their specific location in relation to the screen. The tech was first deployed in October 2024 in the LA Clippers new Intuit Dome arena and can currently be experienced by up to 100 people. Speaking at AXS Drive the previous month, CEO Albert Ng said that the potential for one-to-one connection in shared spaces is "the holy grail for branding and advertising."

Cosm Experience Center

Consumers are increasingly keen to move seamlessly through realities; 43% of generation Z already say they don't see a difference between the virtual or physical—it's all real to them. For more on these shared realities, see World-conjuring tech (page 254).

Why it's interesting

Emerging technology solutions that provide shared experiences can be immersive and deeply personalized, allowing for a truly collective experience across realities, without closing off the physical experience.

19

Cosm venue concept

20

GRIEF TECH

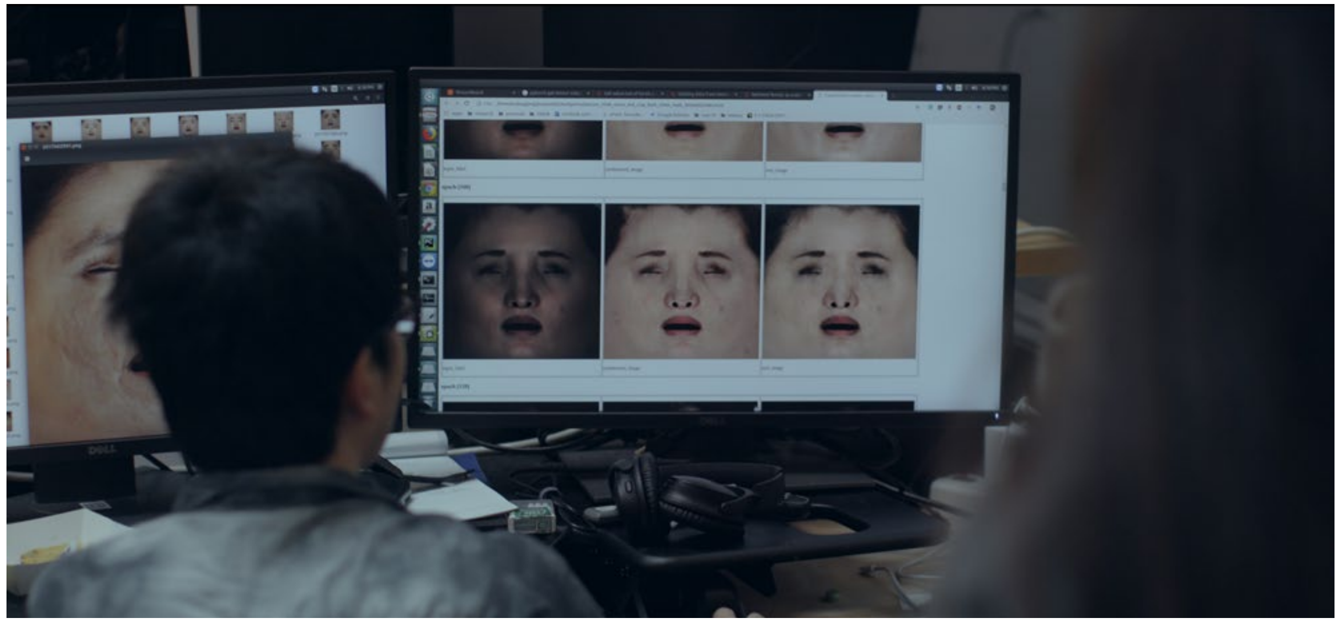
Does death have to mean the end of contact with our loved ones? Perhaps not, if AI has its way.

Via multiple forms, from posthumous AI-generated avatars to chatbots that enable “conversations” with the deceased, the idea that tech can create a form of life after death is taking hold. Seventy-one percent of people believe that in the future, the line between what is human and what is tech will blur.

In China, people can create avatars of deceased loved ones for as little as ¥20 (less than $3), the *Guardian* reported. Zhang Zewei, founder of Chinese AI firm Super Brain, believes that since he established the company in mid-2023, it has helped thousands of Chinese people “digitally revive” those who have died, using as little as 30 seconds of audiovisual material. The form of the avatars created by Super Brain can span a chatbot with a digital image through to a 3D human model. Similarly, South Korea’s DeepBrain AI specializes in video-based avatar creation, capturing mannerisms and voices. At the more grandiose end of the griefbot spectrum, Chinese AI company SenseTime created an avatar of its late founder, Tang Xiao’ou, who died in December 2023, to address the company’s annual general meeting in March 2024.

In the United States, You, Only Virtual, founded by tech entrepreneur Justin Harrison, hopes grief tech can provide an outlet that offers the possibility of “total eradication of grief.” The HereAfter app, which prompts users to record voice stories about their lives, bills itself as “remembering reinvented.”

Yet the prospect of reviving likenesses of the dead, potentially without their consent, is an ethical minefield, one of several among the issues that grief throws up that are addressed in the documentary *Eternal You*, released in June 2024. The film examines how “the boundary between



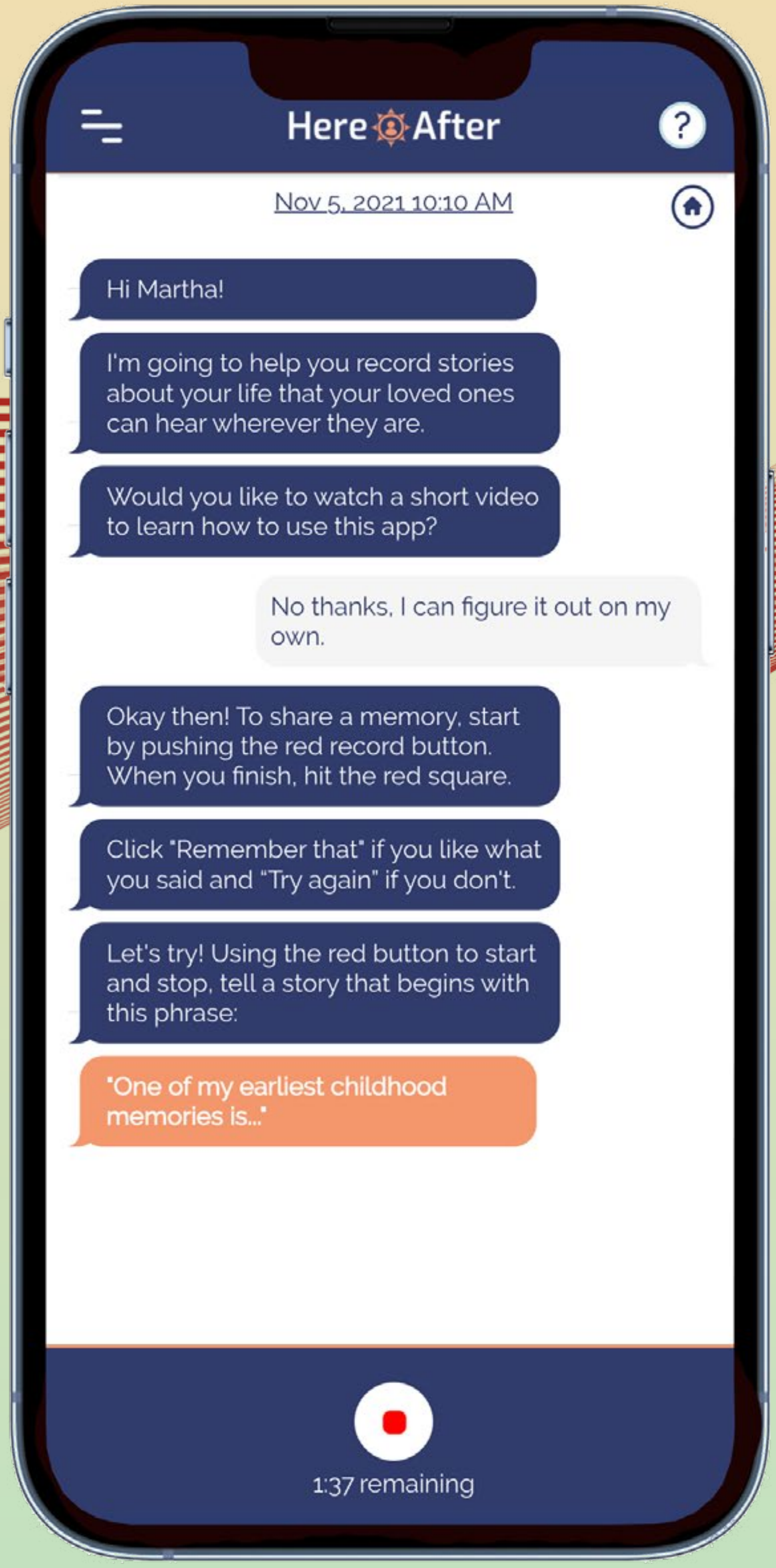
Eternal You. Photo by Konrad Waldmann.
Courtesy of Dogwoof Films

'real' and simulated life is becoming blurred," and "what consequences… the end of finiteness could have for individuals and society."

Dr Chloe Paidoussis-Mitchell, a chartered counseling psychologist and an associate fellow of the British Psychological Society, tells VML Intelligence that avatars of deceased loved ones could "help promote healthy grieving if they are used with a grief-aware mindset." An avatar, she explains, could be used as an "aid to maintaining an ongoing heartfelt bond with the dead, but at the same time not relied upon as a tool to pretend the death hasn't happened."

Why it's interesting

The demand for grief tech is reflected in its market size, estimated at $100 billion globally, according to TechRound. While debate around whether it is helping or hindering the grieving process continues, technology is offering an alternative outlet for those wishing to prolong the lives of deceased loved ones (for more see Digital immortality, page 244).



Nov 5, 2021 10:10 AM

Hi Martha!

I'm going to help you record stories about your life that your loved ones can hear wherever they are.

Would you like to watch a short video to learn how to use this app?

No thanks, I can figure it out on my own.

Okay then! To share a memory, start by pushing the red record button. When you finish, hit the red square.

Click "Remember that" if you like what you said and "Try again" if you don't.

Let's try! Using the red button to start and stop, tell a story that begins with this phrase:

"One of my earliest childhood memories is…"

HereAfter

21

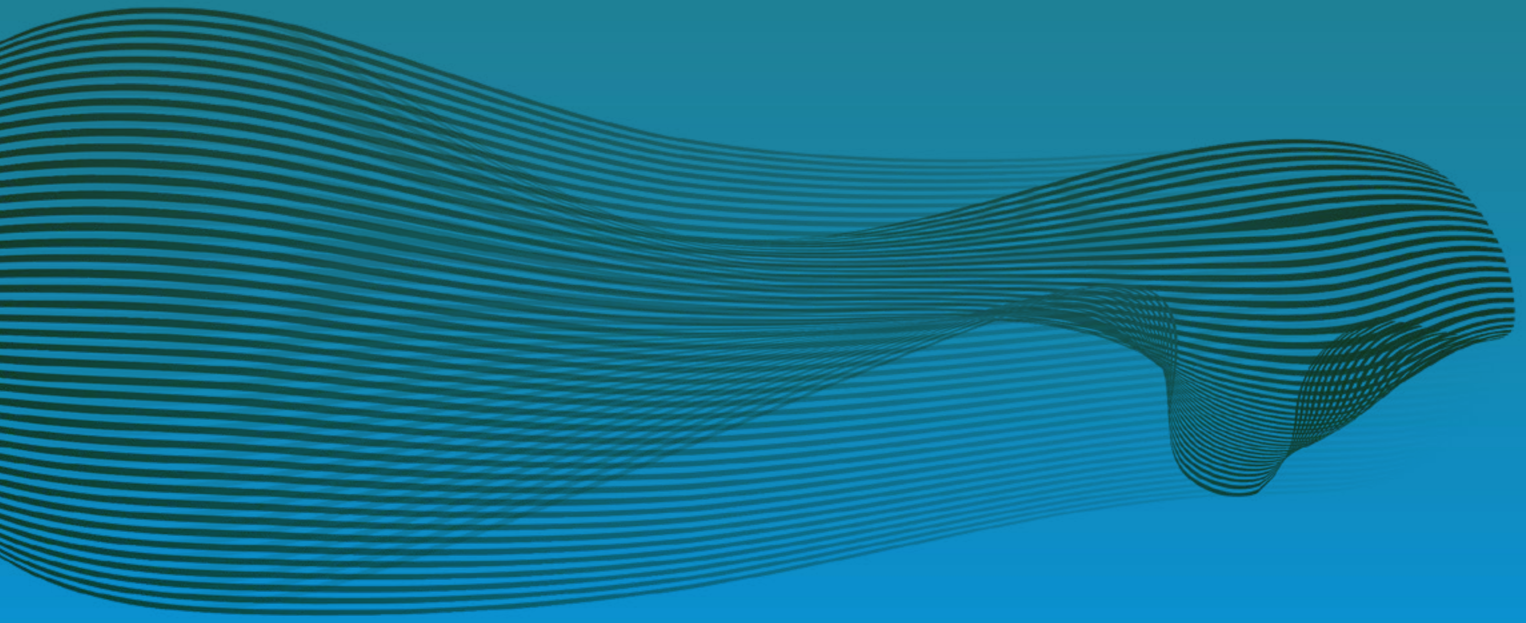
TRAVEL & HOSPITALITY

30

21

ARTFUL STAYS

As the intersection of art and hospitality deepens, leading hotels and travel experience providers are redefining what it means to provide a memorable stay.



MGM West Bund collaborates with artist Nigel Nolan

Brands are moving beyond standard luxury to collaborate with artists, transforming spaces into immersive, art-filled environments that engage guests on an emotional and sensory level. In China, MGM Shanghai West Bund is pioneering this by embracing the ethos that "art is a mirror of life," as Byron Chong, the hotel's general manager, reveals to VML Intelligence. The hotel collaborates with local and international artists to create spaces where art becomes more than decor—it's an interactive, meaningful part of the experience. Through installations, custom rooms, and exclusive dining experiences, guests are invited to explore art not as something distant but as an integral part of everyday life. This approach is embodied by the collaboration with Canadian artist Nigel Nolan, who debuted his art-filled hotel room in March 2023, designed to evoke "a utopian world." Using sustainable materials, recycled water bottles, and interactive fashion pieces, the project aims to engage guests in conversations around creativity and sustainability, setting a new standard for cultural experiences in hospitality.

Similarly, the Park Hotel Tokyo has taken a distinctive approach with its 42 bespoke rooms, designed by prominent Japanese artists. Room 3418, completed in October 2024, showcases Ishikawa-based artist Koto's vibrant interpretations of Japanese patterns and motifs, drawing inspiration from everyday cultural symbols. The hotel's commitment to integrating contemporary Japanese art into its identity creates a unique and deeply personal connection for visitors, making it more than just a place to stay—it's a cultural experience in itself.

The Venice Simplon-Orient-Express also embraces this concept with L'Observatoire, a new artist-designed carriage by the globally celebrated artist JR. Known for his monumental public art, JR has transformed an entire train carriage into an "observatory on wheels," reimagining the luxury train journey as an exploration of curiosity and creativity. Inspired by Renaissance cabinets of curiosity, L'Observatoire is crafted with great attention to detail, incorporating traditional marquetry, stained glass, and Renaissance influences. It is available for booking from March 2025, and guests can stargaze through an oculus-shaped skylight, explore hidden nooks such as a private tearoom, or simply enjoy the changing landscape through panoramic windows. Each detail of JR's design, from handcrafted fixtures to evocative artwork, invites travelers to experience a journey that's as much about discovery as it is about luxury.

Bedroom at L'Observatoire Suite by JR, Venice Simplon-Orient-Express, a Belmond train, Europe

Why it's interesting
Artful stays reflects a broader shift in the hospitality industry toward more personalized and emotionally resonant experiences. By partnering with artists and pushing the boundaries of design, these hotels and travel experiences meet the growing desire among travelers for unique, meaningful stays.

Bathtub and dining area at L'Observatoire Suite by JR, Venice Simplon-Orient-Express, a Belmond train, Europe

22

DESTINATION SOLITUDE

Travelers are seeking out restorative solitude.

Folly Mojave, the Folly Collection

Who is your ideal travel companion? According to research by Hilton, two-thirds of solo travelers (64%) want nothing more than a good book as their travel buddy. Globally, 63% of gen Zers and 59% of millennials say they would enjoy going on vacation alone. Travel specialist Black Tomato reports that bookings for its temporary Blink camps in some of the world's most remote locations have soared by over 40% since 2021. Now destinations and resorts are foregrounding solitude and serenity, while designers are crafting travel experiences with the needs of the lone traveler in mind.

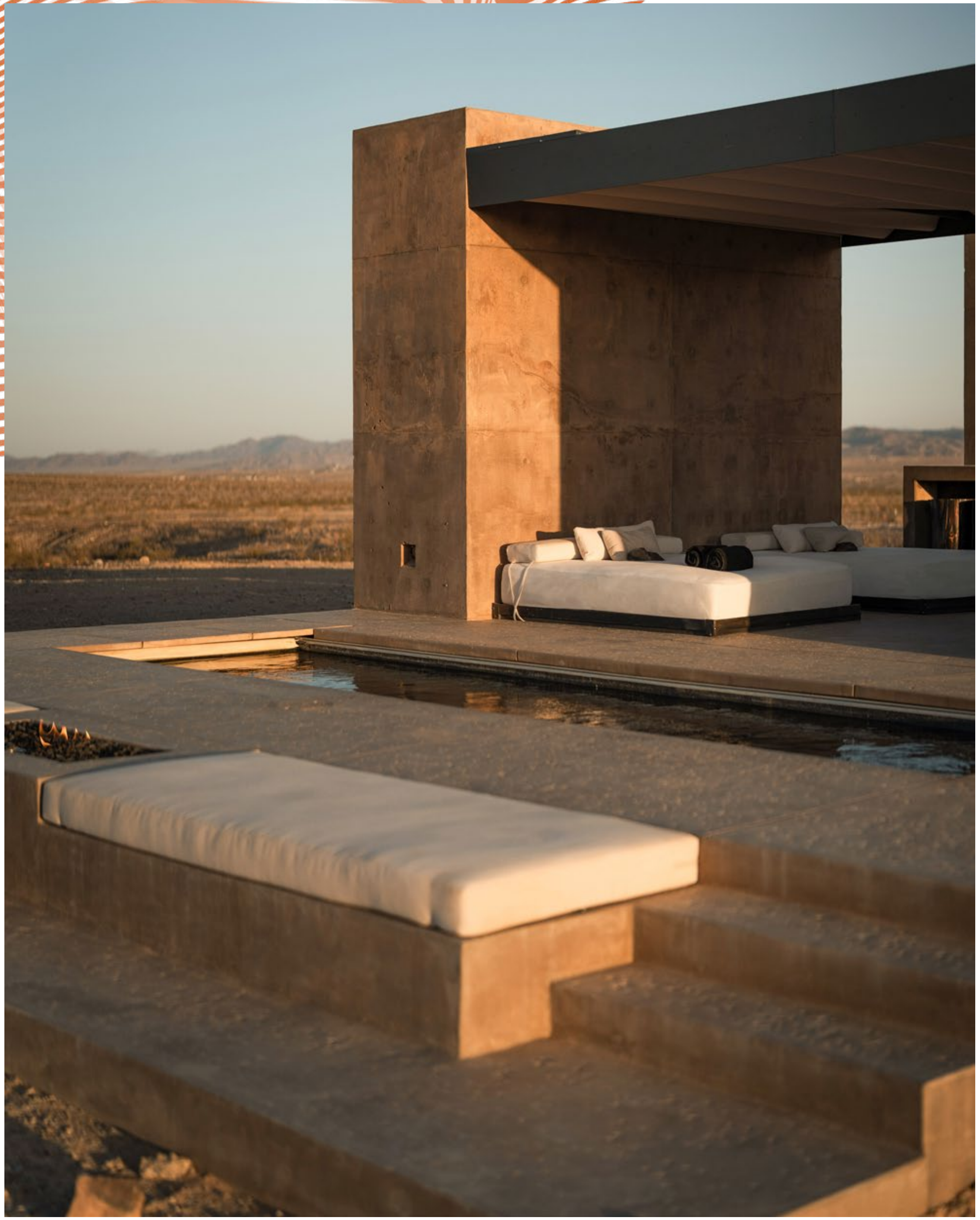
Folly Collection specializes in "off-grid architectural sanctuaries designed for ultimate peace and disconnection." Designed by LA-based architect Malek Alqadi, Folly Mojave is the latest property in the portfolio, located at the intersection of the Mojave National Preserve and Joshua Tree National Park. Made up of three monolithic suites, it is set in the extreme isolation of an arid landscape under vast desert skies. "Travelers today are increasingly drawn to unique, off-grid spaces like Folly Mojave," Hillary Flur, cofounder of Folly Collection, tells VML Intelligence. "These retreats offer a chance to reconnect with nature, providing an immersive environment away from the usual distractions. It's about finding relaxation in simplicity and embracing an experience that feels authentic and rejuvenating."

Bókun, a Tripadvisor company specializing in tour-operator software, has highlighted the rise of "quiet travel" for people seeking out destinations that offer calm and serenity, with Macedonia, the Netherlands, and Luxembourg among key examples. In Namibia, one of the world's most sparsely populated countries, the NamibRand Nature Reserve has been designated Africa's First Wilderness Quiet Park by Quiet Parks International. It is only the fourth public space in the world to receive the designation, which is awarded to places that preserve the silence of nature and offer "exceptional acoustic beauty."

Folly Mojave, the Folly Collection

The travel industry is stepping up to better serve serenity-seeking solo travelers. In August 2024, the *New York Times* reported on the rise of solitude-friendly design, with architects and designers creating spaces that welcome those alone without marginalizing or isolating them.

At Harvey Milk Terminal 1 at San Francisco International Airport, opened in July 2024, HKS Architects designed a dedicated space for solo travelers. A row of window-facing loungers is separated from the main space by a



Folly Mojave, the Folly Collection

63% OF GENERATION Z WOULD ENJOY GOING ON VACATION ALONE.

series of large planters, creating an atmosphere of seclusion where solo travelers can relax comfortably without feeling overlooked.

Monika Jiang, founder of Sharing Our Loneliness, tells VML Intelligence that solitude, which she calls “aloneness,” is “the ability to be alone with yourself.” While it’s often conflated with loneliness, Jiang explains that “it's really that ability to not just self-regulate but also develop self-compassion.” The benefits of solitude-centered travel go beyond restorative “me-time”—it also helps us to better connect with others. Jiang describes solitude as a pathway to connection: “If we’re not connected to ourselves and we do not value and cherish moments of solitude, I think it is also hard to then really cherish the moments of connection with other people.”

Why it’s interesting

Solitude is now a purposeful form of leisure. Hospitality brands and travel providers are designing with solitude and aloneness in mind, crafting experiences that offer tranquility and space for reflection.

23

BLUE ZONE RETREATS

Wellness resorts propel the longevity revolution with programs based on Blue Zone living.

VML

Blue Zones are geographic areas where residents live longer and healthier lives than average and are home to many centenarians. Experts have scientifically measured how people in these destinations, with different cultures, genders, and financial means, can happily and healthily live longer. “It shows that living longer, better, is for everyone, everywhere, and it can be simple,” Céline Vadam, Blue Zones retreats and hospitality expert, tells VML Intelligence. Now luxury resorts are introducing Blue Zones to their retreat programs, with many led by Vadam.

In October 2024, the five-star Halekulani Okinawa resort in Japan hosted a Blue Zones retreat as part of its three-year partnership with Blue Zones, introducing guests to evidence-based integrated wellness habits for longevity. The program included plant-based cooking classes with an Okinawan vegetable sommelier, sunrise sailing and meditation, and ceramics classes. In the United States, the regenerative Rising Circle Ranch in Santa Fe conducted its sold-out retreat from October 28 to November 2, 2024, with prices starting from $4,000 per person.

In May 2025, the five-star Kamalaya Koh Samui in Thailand will host a Blue Zones retreat. Activities include herbal walks, temple tours, nutritional guidance, and cooking classes. “When people come to Blue Zones retreats, they go home with concrete, actionable tools that they can implement straightaway into their lives,” Vadam explains. “The Blue Zones principles can be applied at every level of our environments—personal, work, community—with many opportunities and touchpoints to make shifts that will enhance everybody’s lives.”

Last year, “The Future 100: 2024” identified “longevity resorts,” which, much like Blue Zones retreats, bolstered programs prolonging lifespan. In 2022,

we identified the popularization of Blue Zone diets, where people adopted food from these specific areas. Vadam believes Blue Zones principles must go beyond retreats to ensure health spans juxtapose lifespans. She says Blue Zones projects “are constantly expanding and thinking outside the box to see how we can reach more people and help everyone in the world live better, longer.”

Why it’s interesting

A “longevity revolution” is underway in all countries, according to the United Nations, as the number of people living to 100 years old is expected to increase eightfold to 3.7 million by 2050. To address the health span of an aging population, wellness destinations are looking to Blue Zones for inspiration.

Halekulani Okinawa

Above top: The Onda Spa. Courtesy of Andaz Costa Rica Resort at Peninsula Papagayo
Above: Blue Zones Retreat. Courtesy of Andaz Costa Rica Resort at Peninsula Papagayo

24

INCENTIVIZED GOOD BEHAVIOR

Cities and travel companies are taking a carrot rather than a stick approach in the face of overtourism, by incentivizing good behavior.

CopenPay

According to a forecast from the World Travel & Tourism Council, the travel sector's global economic contribution in 2024 is set to reach an all-time high of $11.1 trillion. This has meant a surge in tourists in prime destinations, with this rise sometimes upsetting the delicate balance to be struck between residents' needs and tourists' wants.

While some destinations are cracking down on tourists disturbing local people and neighborhoods, others are aiming to actively incentivize good behavior. In Copenhagen, the CopenPay scheme, trialed in summer 2024, rewarded tourists who engaged in environmentally friendly activities such as litter picking, cycling, or volunteering at urban farms. Rewards included complimentary guided museum tours, free kayak rentals, and even free lunches. Mikkel Aarø-Hansen, CEO of Wonderful Copenhagen, says that behind the scheme lies the organization's goal of encouraging "visitors to make conscious, green choices and hopefully end up getting even better experiences while they visit." The scheme, he explains, aims to "incentivize tourists' sustainable behavior while enriching their cultural experience," describing it as "an experimental and a small step toward creating a new mindset among travelers."

To counteract overtourism, the Florida Keys Eco-Experience Trail Pass gives guests points for checking in at any of the 55 attractions on the route, as reported by the *New York Times*. The publication notes that the app, introduced in January 2024, "gamifies exploration and attempts to spread visitors out across the 125-mile-long island chain from Key Largo to Key West," to avoid overcrowding. The points can be exchanged for gifts such as tote bags and discounts on experiences.

In the Montagne Verte ski resort, the AlpinExpress Pass offers discounts for those who take a train to the resort, from 10% off ski passes to 5% off ski and snowboard equipment hire, and 10% off spa treatments. "Our goal is to incentivize visitors to choose train travel and contribute to preserving the alpine environment," the resort's management says.

Why it's interesting

Destinations around the world want to attract tourists—and their spending. Yet at the same time, they want to make sure those tourists behave in a way that doesn't jeopardize a destination's future. Incentivized good behavior is one way to strike that balance, making it a win-win for tourists and destinations alike.

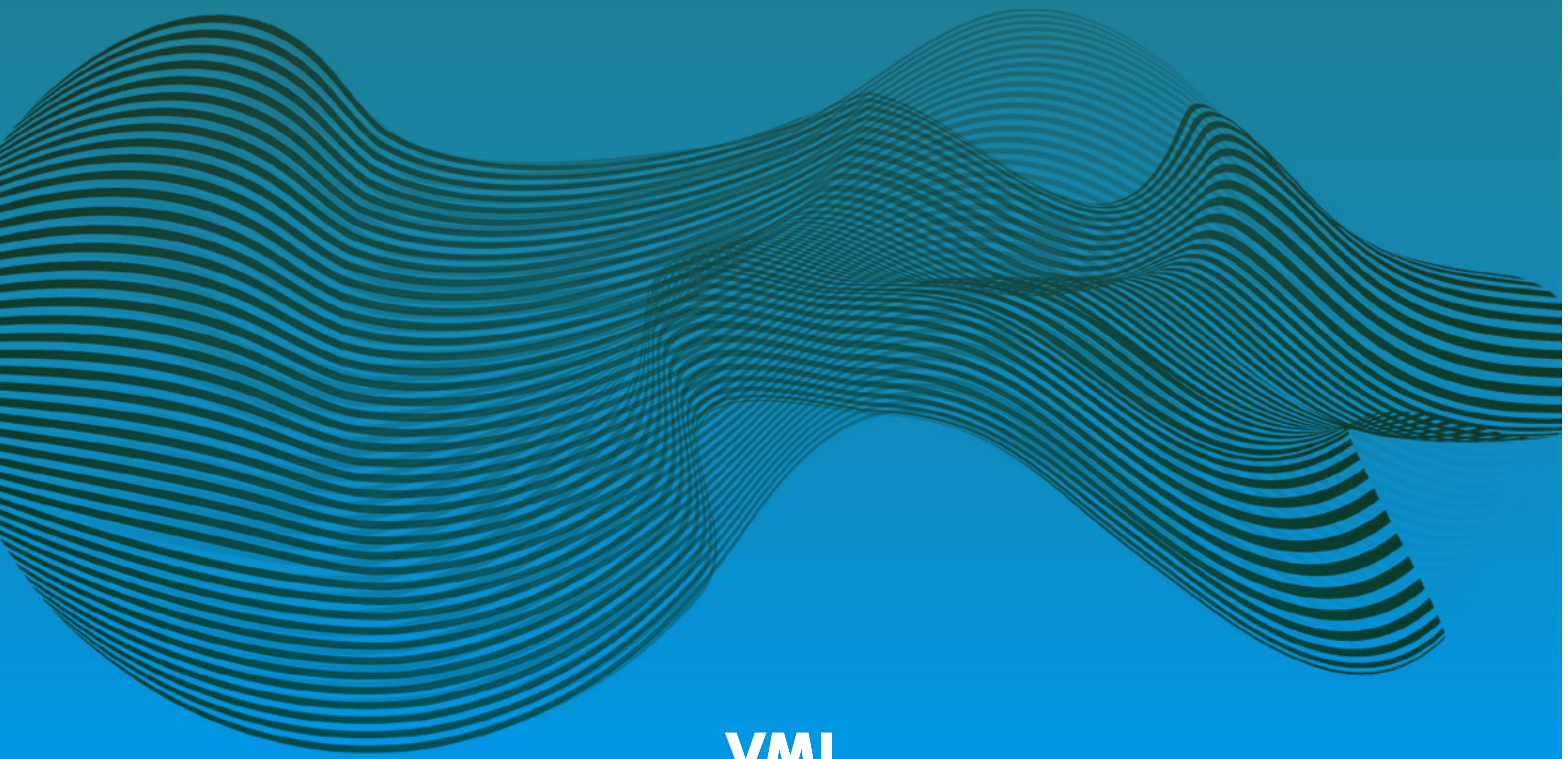
PILGRIM
DENMARK
AFA JCDecaux
visit copenhagen
DEAR TOURIST,
24 COPENHAGEN ATTRACTIONS REWARD YOUR CLIMATE-FRIENDLY ACTIONS.
with COPENPAY
SCAN AND TRY TODAY

CopenPay. Courtesy of Mark Tanggaard

25

ASTRO TRAVEL

Astrological travel gains in popularity as explorers seek to blend wanderlust with personalized cosmic guidance.



Sanctuary x Moxy Hotels

When it comes to choosing destinations, when to travel, and even who to holiday with, travelers are increasingly turning to astrology for guidance. “We have seen a really substantial increase, specifically in the bringing together of astrology and travel,” Haley Houseman, creative director at astrology app Sanctuary, tells VML Intelligence. Sanctuary has teamed up with Marriott International’s Moxy for a year-long partnership that will include digital astrological guides and cocktails tailored to zodiac signs. Guests can even use a playfully retro in-room phone to hear their personalized Sanctuary horoscopes.

According to Business Research Insights, the global astrology app market is projected to increase to $23.87 billion by 2032. A growing number of hotel brands are tapping into the trend with curated stays that cater to a desire for holidays with cosmic intention and purpose.

In London, throughout 2024 and 2025, The Standard is running its Zodiac Retreat—a bespoke astrology experience featuring a personalized tarot reading via QR code, zodiac-themed amenities, and beauty treatments tailored to each specific star sign. The package also includes a birth-chart reading as well as a curated minibar selection, in-room decor inspired by astrological traits, and exclusive access to events aligned with the current cosmic calendar. Similarly, Nobu Hotel Santorini has partnered with Veronique Gabai to launch the Holistic Astrology Retreat, a wellbeing experience also tailored to each guest’s zodiac sign.

As self-growth becomes a priority for gen Z and millennials, Houseman reflects on why the appetite for astrological travel will continue to grow. “Astrology is really identity-driven,” she says. “It helps people learn about themselves. It helps people grow. It helps them see things in a new light and that is exactly what travel does too—it’s that transformational aspect that people are seeking.”

Holistic Astrology Retreat, Nobu Hotel Santorini

Why it’s interesting

In uncertain times, people are turning to the spiritual guidance offered by astrology for both reassurance and meaning. With increasing workloads and rising costs, vacations are no longer a frivolous decision but an opportunity to integrate holistic self-care. Hotels are taking an adaptive approach and providing playful, personalized spiritual narratives through an astrological lens.

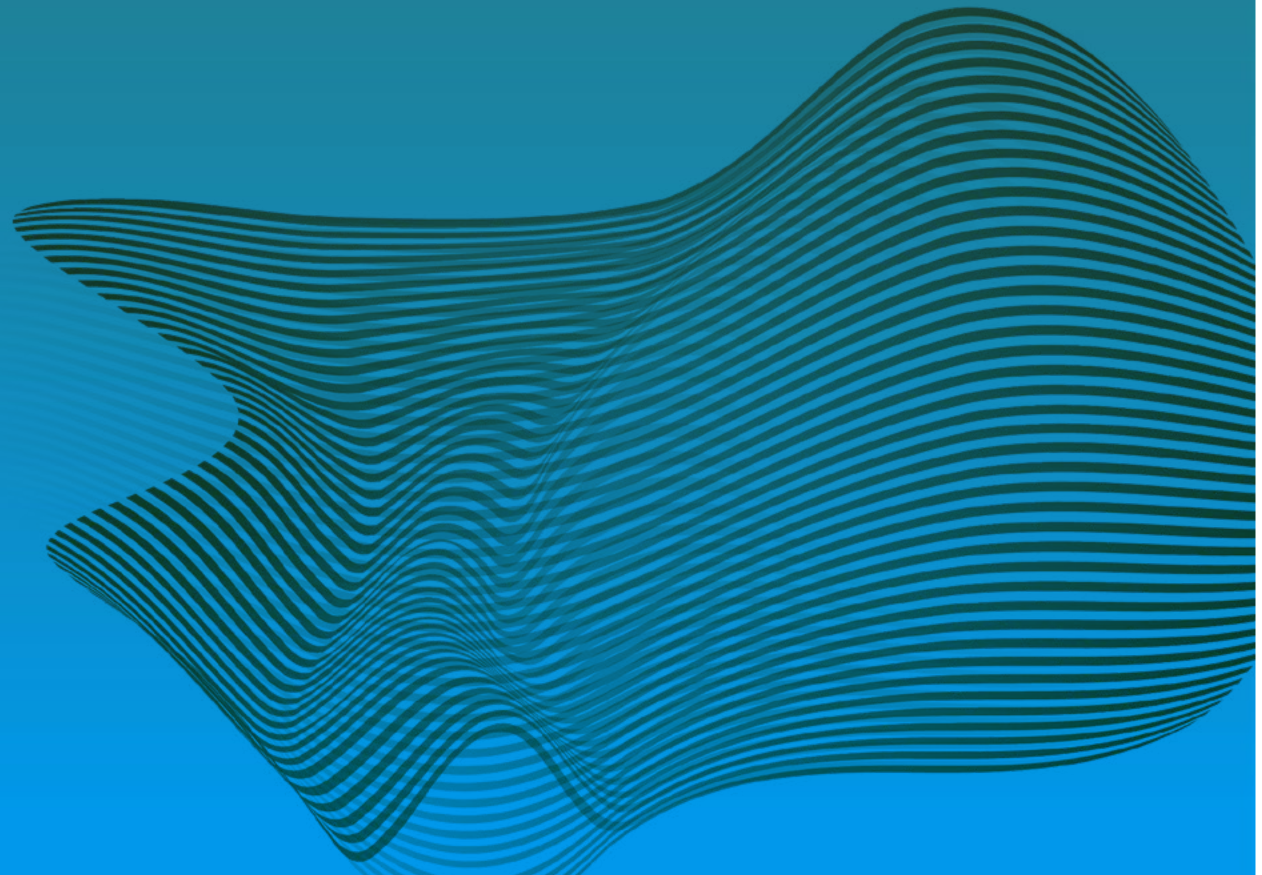
25

Holistic Astrology Retreat, Nobu Hotel Santorini

26

ICONIC HANGOUTS

Inspired by celebrity and pop culture, travel is leaning in to fandom.



Two phrases have gained significant traction in recent years: “Swiftie mania” (Taylor, of course) and “set-jetting” (traveling to TV and movie locations). These terms reflect how culture and fandoms are increasingly influencing and promoting travel destinations and experiences.

Taylor Swift’s Eras Tour—her first global tour in five years, running from March 2023 to December 2024—fueled a massive travel surge. Swifties traveled across the globe to see her perform, turning the tour into a travel phenomenon that boosted local economies. According to the US Travel Association, the total global economic impact of the Eras Tour could exceed $10 billion. The economic boost, seen across hospitality, food, and retail, signals a growing potential for brands to tap into fandom-driven tourism and spending.

Rather than prioritizing the destination itself, 75% of global respondents travel more for the experiences they’ll have. As Swift’s tour exemplifies, fans want to fully immerse themselves in experiences that feel uniquely tied to the worlds of their favorite artists or series. Brands that respond to this by creating exclusive, limited-edition offerings, or partnering directly with artists and studios, can capitalize on the loyalty and enthusiasm of these audiences.

Airbnb hosts in key concert cities saw a 38% increase in income during Swift’s and Beyoncé’s US concerts in the first half of 2023, compared to earnings the previous year. This surge may have inspired the company’s new Icons plan, which offers unique experiences featuring close interactions with celebrities. Guests can, for example, attend an exclusive living room session with Doja Cat or spend a night on the set of Korean boy band Seventeen’s latest music video.

Icons also includes experiences inspired by pop culture. Imagine spending the night in *Up*'s iconic floating house, staying in a 2D-inspired X-Mansion from *X-Men '97*, or visiting Prince's legendary *Purple Rain* home, newly open to the public. *Inside Out 2* fans can even sleep in Riley's Emotion Headquarters.

The Icons series is a new twist on set-jetting, where fans craft vacations around hit movies or TV series, such as *Bridgerton*, *The Bear*, and *The White Lotus*. The "*White Lotus* effect" has significantly boosted tourism and increased bookings at Hawaii's Four Seasons Resort Maui at Wailea and Sicily's San Domenico Palace, Taormina, A Four Seasons Hotel, where seasons one and two of the series were filmed.

While the third season has yet to air, it is already making waves in Thailand, where filming began in February 2024 at the Four Seasons Resort Koh Samui. In June 2024, Agoda reported a 26% year-over-year increase in accommodation searches on the island since filming started.

Marc Speichert, executive vice president and chief commercial officer of Four Seasons Hotels and Resorts, tells VML Intelligence that "for many Four Seasons guests, particularly pop culture enthusiasts and travel trendsetters, *The White Lotus* serves as the ideal source of travel inspiration."

The hotel group has officially partnered with the series and HBO to "embrace a cultural phenomenon that combines exceptional storytelling with the universal love of travel." As anticipation builds for the third season, Four Seasons Hotel Westlake Village will become the world's first immersive hotel experience, inspired by *The White Lotus*. Additionally, many

THE REAL MES

Above top: Seventeen's Airbnb, Seoul
Above: Living room session with Doja Cat, Airbnb Icons

Four Seasons Resort Koh Samui

Four Seasons properties around the globe will offer experiences that reflect the themes of the show's upcoming season, including unique dining options and wellness activities.

Why it's interesting

As Brian Chesky, cofounder and CEO of Airbnb, explains, the Icons experience "takes you inside worlds that only existed in your imagination—until now." With a touch of celebrity magic and pop culture inspiration, these experiences bring a dose of fantasy into the real world, taking travel beyond just a journey to become an immersive fandom-fueled adventure.

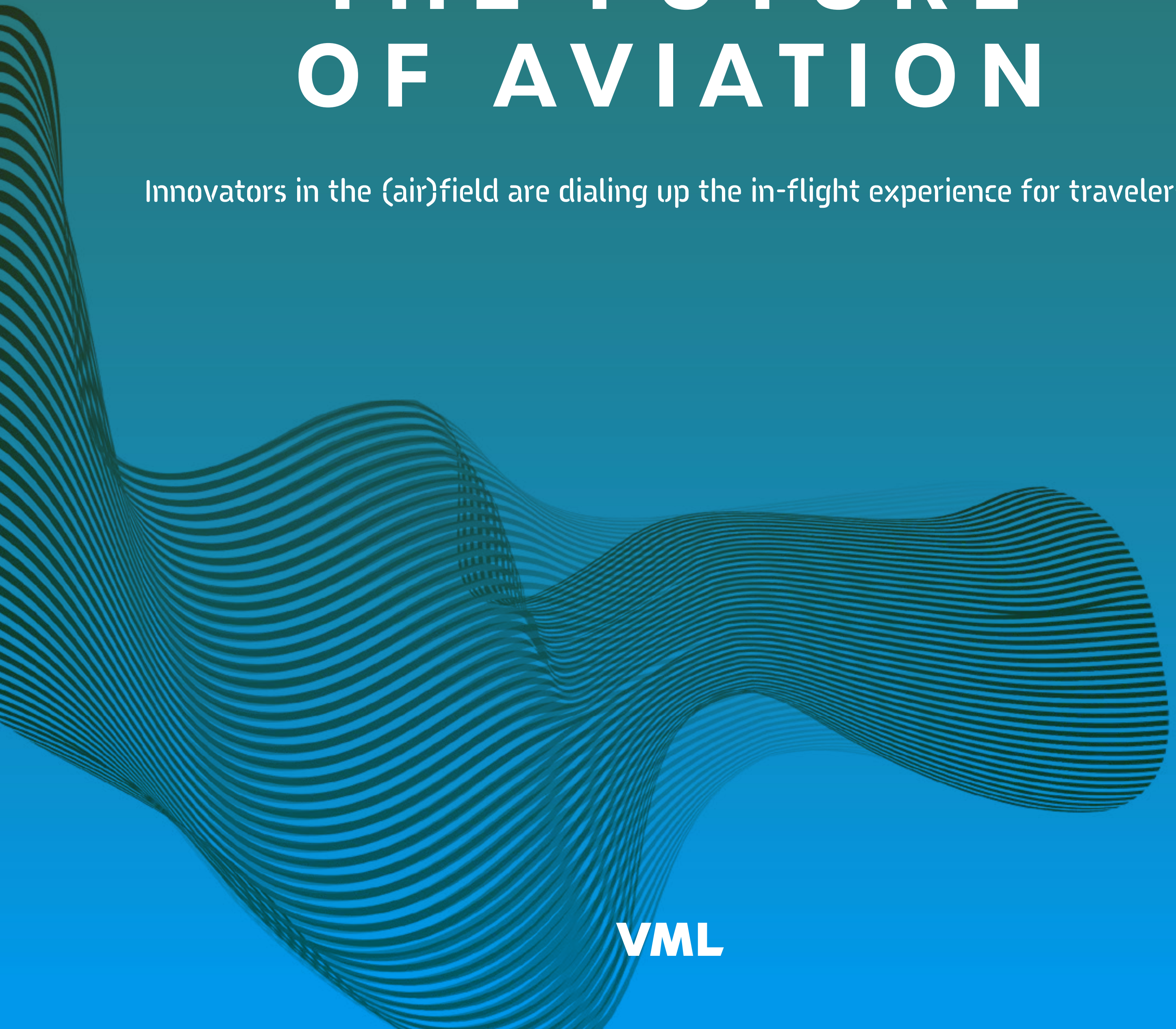
ROLL
B
SCENE
35A
TAKE
EPISODE
EP. 201
SEASON 2
WHITE LOTUS
SICILY
DIRECTOR
MIKE WHITE
CAMERA
XAVIER GROBET, ASC

Four Seasons and HBO partner for
The White Lotus Season 3

27

THE FUTURE OF AVIATION

Innovators in the (air)field are dialing up the in-flight experience for travelers.



Getting customers from one place to another safely just isn't enough of an edge in today's air travel market. In a sector that is ultracompetitive by design, carriers are finding new ways to draw in punters, while the cost of the green transition is being passed onto customers in more meaningful ways.

The annual Crystal Cabin Awards offer a snapshot of new approaches for the coming year. The 2024 prize winners included Qantas and Diehl Aviation's Wellbeing Zone, which is geared around science-based health innovations such as circadian rhythm-optimized lighting and space for stretching and physical activity. The zone is designed to enhance the experience for travelers on the Australian flag-carrier's super-long-haul flight from Sydney to London with no stop-over.

Airlines are also working to upgrade their economy offerings. Turkish Airlines made industry waves after announcing that its entire fleet will feature cabins equipped with full wifi connectivity by the end of 2025. Others are increasing their mid-range class, with Emirates announcing plans to re-vamp some of its planes to include more premium economy seats. This suggests that more travelers are flocking to the middle of the market. In high-end travel, Etihad Airways continues to push the envelope with The Residence—a luxurious three-room suite that more closely resembles an uptown apartment than an aircraft cabin. The greatest amenity of all? It comes equipped with a private ensuite shower.

Why it's interesting

The aviation market has seldom looked tougher as carriers face a collective $5 trillion cost of decarbonizing flying and customers become even more discerning. It's priority boarding for experience and rediscovering the golden age of air travel.

Project Sunrise by Qantas

28

THRIFT TRAVEL

Budget travel is gaining ground as economic headwinds curb spending.

In August 2024, the *Wall Street Journal* suggested that the boom in travel spending had slowed, with hotels and airlines expecting US leisure travel to "soften" in the coming months. Companies including Disney, Airbnb, and Hilton are among those seeing signs of slowing demand on the back of economic headwinds and rising prices, which are denting disposable income for travel, the *Financial Times* reported. Two-fifths (41%) globally are cutting back spending on traveling for pleasure, rising to 49% for gen X. While the affluent continue to take their holidays abroad, others are becoming more frugal.

Against this backdrop, brands are crafting new wallet-friendly incentives to entice travelers. Budget airline Wizz Air, for example, has launched an All You Can Fly service, offering customers unlimited flights for an annual subscription charge of $634, and a flat fee of around $10 per flight, plus any additional luggage.

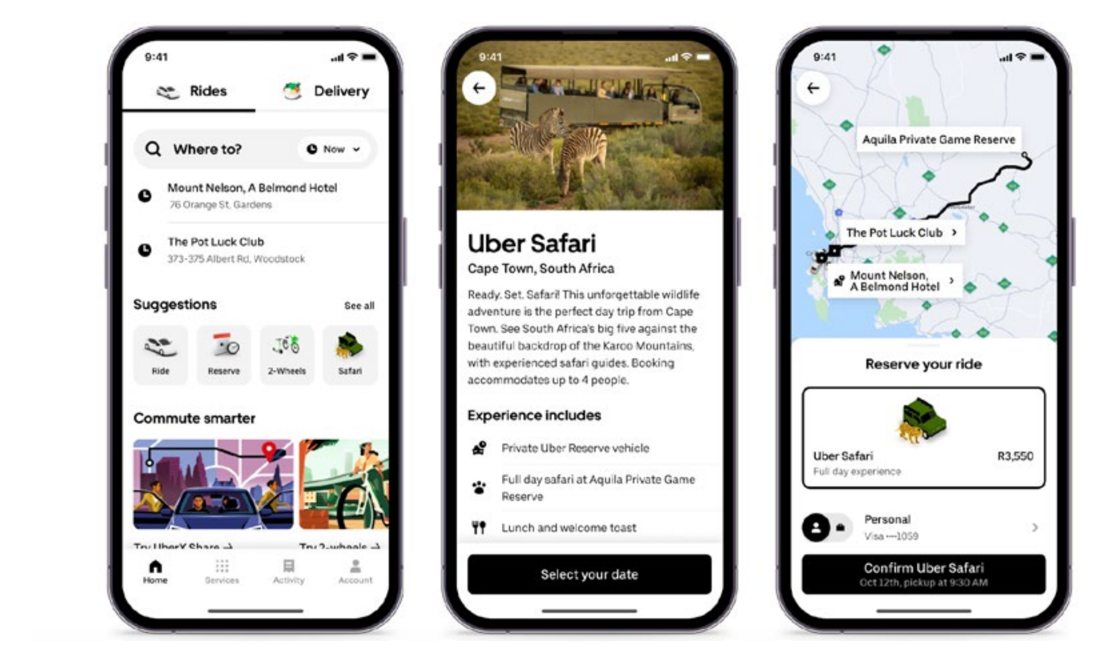
Uber Safari game drive

49% OF GEN X GLOBALLY ARE CUTTING BACK SPENDING ON TRAVELING FOR PLEASURE.

Uber is giving visitors to Cape Town the chance to book an Uber Safari day trip via its app, in partnership with Aquila Private Game Reserve. Groups of up to four people will have the opportunity to see South Africa's "big five" animals—lions, elephants, buffalo, leopards, and rhinos—for an affordable $200 flat fee.

Discounter Aldi Australia is extending its no-frills approach to travel with the launch of its Aldi Holidays online portal. Customers can choose from a suite of exclusive deals on escapes, cruises, and tours. Priced from around $290 per person, its first drop of packages in October 2024 included Surfers Paradise, the Whitsundays, Fiji, Thailand, and Hawaii, as well as cruises around the Pacific Islands and Japan.

"Here in the United States, we're seeing many more examples of thrifty travel emerge," design and travel writer Dan Howarth explains to VML Intelligence. "The popularity of low-cost airlines like Spirit and Frontier continues to grow, and the stigma of traveling with them is declining, so budget-conscious travelers are flying domestically for less money.



9:41
Rides
Delivery
Where to?
Now
Mount Nelson, A Belmond Hotel
76 Orange St, Gardens
The Pot Luck Club
373-375 Albert Rd, Woodstock
Suggestions
See all
Ride
Reserve
2-Wheels
Safari
Commute smarter
Home
Services
Activity
Account
9:41
Uber Safari
Cape Town, South Africa

Ready. Set. Safari! This unforgettable wildlife adventure is the perfect day trip from Cape Town. See South Africa's big five against the beautiful backdrop of the Karoo Mountains, with experienced safari guides. Booking accommodates up to 4 people.

Experience includes
Private Uber Reserve vehicle
Full day safari at Aquila Private Game Reserve
Lunch and welcome toast
Select your date
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Aquila Private Game Reserve
The Pot Luck Club
Mount Nelson, A Belmond Hotel
Reserve your ride
Uber Safari
Full day experience
R3,550
Personal
Visa ····1059
Confirm Uber Safari
Oct 12th, pickup at 9:30 AM

Uber Safari booking screens

Travelers are opting for lower-budget vacations, such as visiting local beaches, national parks, and historic sites or destinations that are accessible by train or car, rather than flying huge distances. And with increased luggage fares on several airlines, people who are traveling abroad are traveling lighter."

There's also an element of environmentalism in vacationing closer to home, Howarth suggests: "It's better for the planet as well as lower cost, so many people—particularly younger generations—consider that a win-win."

Why it's interesting

Economic uncertainty is dampening the travel outlook as consumers across the generational spectrum attempt to be more frugal with their travel plans. However, as the Uber Safari launch highlights, their budgets may be tighter but they still expect authentic experiences.

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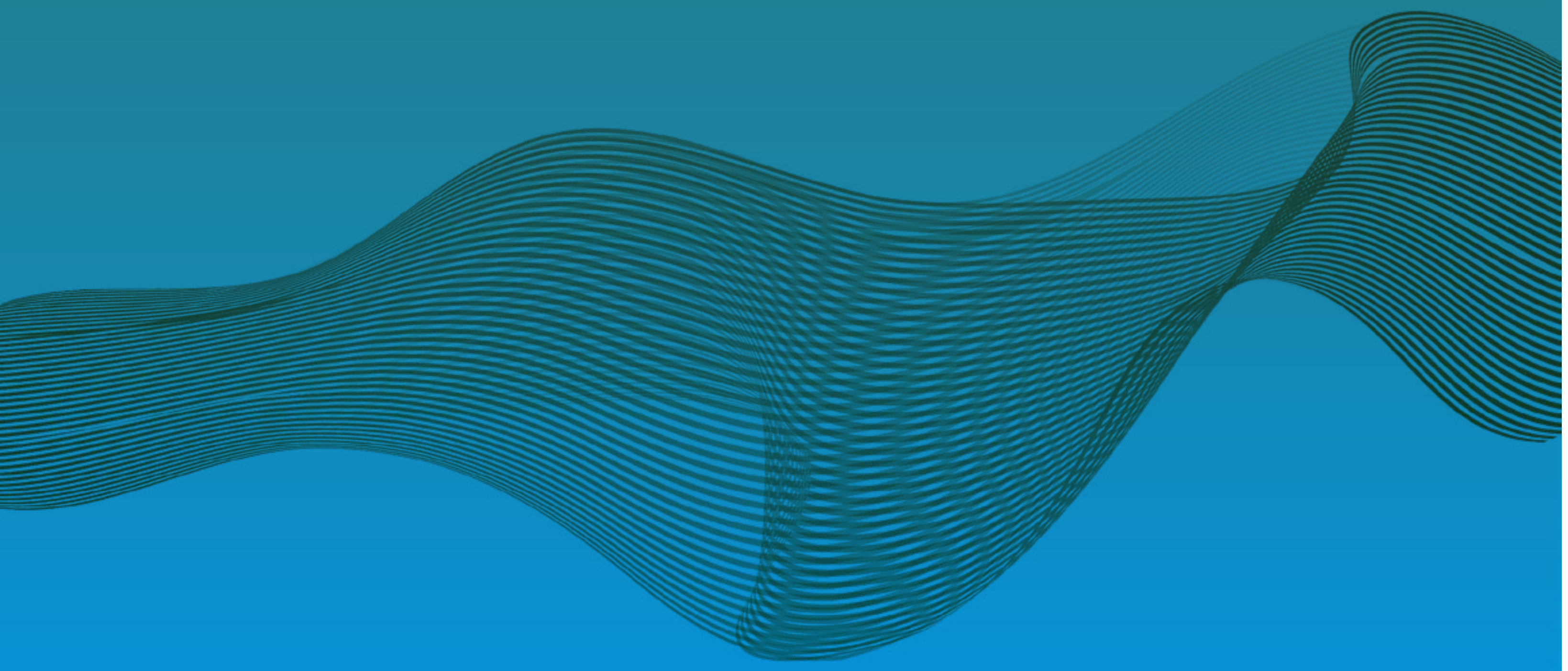
TOP THREE DESTINATIONS



1. Benin, West Africa
The West African republic of Benin is drawing visitors to experience its rich culture and heritage. The royal palaces of Abomey, a UNESCO World Heritage site and symbol of the former Kingdom of Dahomey, are being restored, with completion scheduled for the end of 2025, while a new museum in Abomey will house reclaimed royal artifacts returned by France in 2021.

In Benin's largest city, Cotonou, a new cultural quarter, Le Quartier Culturel et Créatif, is set to open in 2026, with a contemporary art museum, a sculpture garden, a cultural institute, a concert arena, and a crafts village. Two other major museums are underway: the Maison de la Mémoire et de l'Esclavage in Ouidah, focusing on the history of slavery, and a Vodun Museum in Porto-Novo, Benin's capital, to reframe understanding of the often misunderstood vodun (vodou) religion. Hospitality brands are now stepping up their presence. Sofitel opened Benin's first five-star hotel in Cotonou in September 2024, while Intrepid Travel has added Benin to its 2025 itineraries, offering a 15-day tour of Benin, Togo, and Ghana.

2. Tartu, Estonia

Tartu, Estonia's second largest city after Tallinn, was thrust into the limelight after being named one of three European Capitals of Culture for 2024 by the European Commission. Its year-long festival of artistic events has attracted the attention of UK sightseers in particular, who propelled the city to the second spot in Skyscanner's top trending destinations for 2025 among British travelers. The draw? The *Guardian* describes Tartu as a "creative and youthful city," home to one of the oldest universities in the Baltics and an art school. Street art abounds thanks to the annual Stencibility festival and Edward von Lõngus—Estonia's answer to Banksy—is also based here. As one of Europe's less densely populated countries, interest in travel to Estonia has ballooned in recent years according to Tilastokeskus statistical institution, with new routes to Tartu and its relative affordability compared to other Western European cities (see Thrift travel, page 88) only adding to its appeal.

Aparaaditehas Widget Factory Festival © Kiur Kaasik Courtesy of Visit Estonia

3. Osaka, Japan

Named a must-visit destination for 2025 by Lonely *Planet*, Osaka is described as "one of the most open-minded and dynamic cities in Japan." It is helping to build Japan's soft power (page 31), making history as the nation's first city to host the World Expo twice. Having last staged the event in 1970, the port city will again welcome the world fair from April 2025 at Yumeshima Island in Osaka Bay, with the theme of Designing Future Society for Our Lives.

Visitors to Osaka can feast at Monsieur Dior, a new collaboration between French fashion house Dior and acclaimed French chef Anne-Sophie Pic, which opens in 2025. It follows the launch of the duo's Café Dior at Kansai International Airport at the end of 2024, which serves up pastries and cakes inspired by Christian Dior's archives.

Significant renovations at RIHGA Royal Hotel Osaka are also set to complete in March 2025 as the chain elevates the luxury and comfort of its guest rooms. Redesigned rooms are based on the concept of "merging traditional beauty with water," according to the brand, and are inspired by Osaka's floating Nakanoshima island. This follows the launch of the all-new Four Seasons Hotel Osaka in September 2024, featuring the Sushi L'Abysse Osaka restaurant that marries French innovation with Japanese techniques.

30

GEN ALPHA VACATIONS

Family vacations are getting a gen alpha makeover.

The Logan Philadelphia Curio Collection by Hilton

All hail the new travel influencers: generation alpha (aged 0-15) may be the least experienced vacationers, but they are already dictating family plans. Hilton's "2025 Trends Report" found that 70% of global respondents who travel with their children pick their vacation destination based on their kids' needs and interests. The majority (63%) also let their kids pick where they dine, while 56% choose hotels based on youth programming options.

In response to this shift, Hilton has started offering complimentary kids' club access and activities across its all-inclusive resorts, while other travel and hospitality brands are also embracing the growing power of gen alpha. Hong Kong's luxury Shangri-La hotel, for example, has redesigned several of its floors to appeal to gen alpha, including treehouse and submarine-themed rooms.

Aurelia van Lynden, director of travel at luxury travel firm Pelorus, has also observed the decisive role played by gen alphas in shaping travel decisions. “Children are at the front and center of discussions,” she tells VML Intelligence. “They are leading on what the family holiday focus should be and often inputting their interests and goals in the process. We are seeing a surge in enquiries for cultural trips to New Zealand and Japan, and for wildlife educational trips to Botswana in particular.”

Targeting the tweens and teens in the gen alpha cohort, South African travel company Wesgro builds experiences in *Roblox* that highlight the appeal of its leading attractions. Jean Scheltema, Wesgro’s chief marketing and innovation officer, says this “draws on the insight that the youth market has a significant role to play in influencing family holiday decisions.”

Adventure travel company Intrepid Travel has seen a 20% growth in family holidays in 2024 and is forecasting a further 25% rise. CEO James Thornton believes the brand’s focus on sustainability, local hotels and restaurants, and authentic cultural experiences really appeals to gen alpha. “Many Intrepid itineraries include visits to local social enterprises,” he tells VML Intelligence. “Families have the opportunity to get involved with activities and learn about challenges in the local destinations and how travelers can help support positive change.”

Why it’s interesting

The impact of gen alpha on travel destinations mirrors their increasing role in their families’ weekly grocery shopping. It is no longer enough to cater to the needs of parents—travel and hospitality brands need to very specifically meet gen alpha’s demands of sustainability, authentic local experiences, and digital connectivity.

Family trips to Japan, Intrepid Travel

30

Conrad Tianjin Kiki Dino themed kids' room, Hilton

31

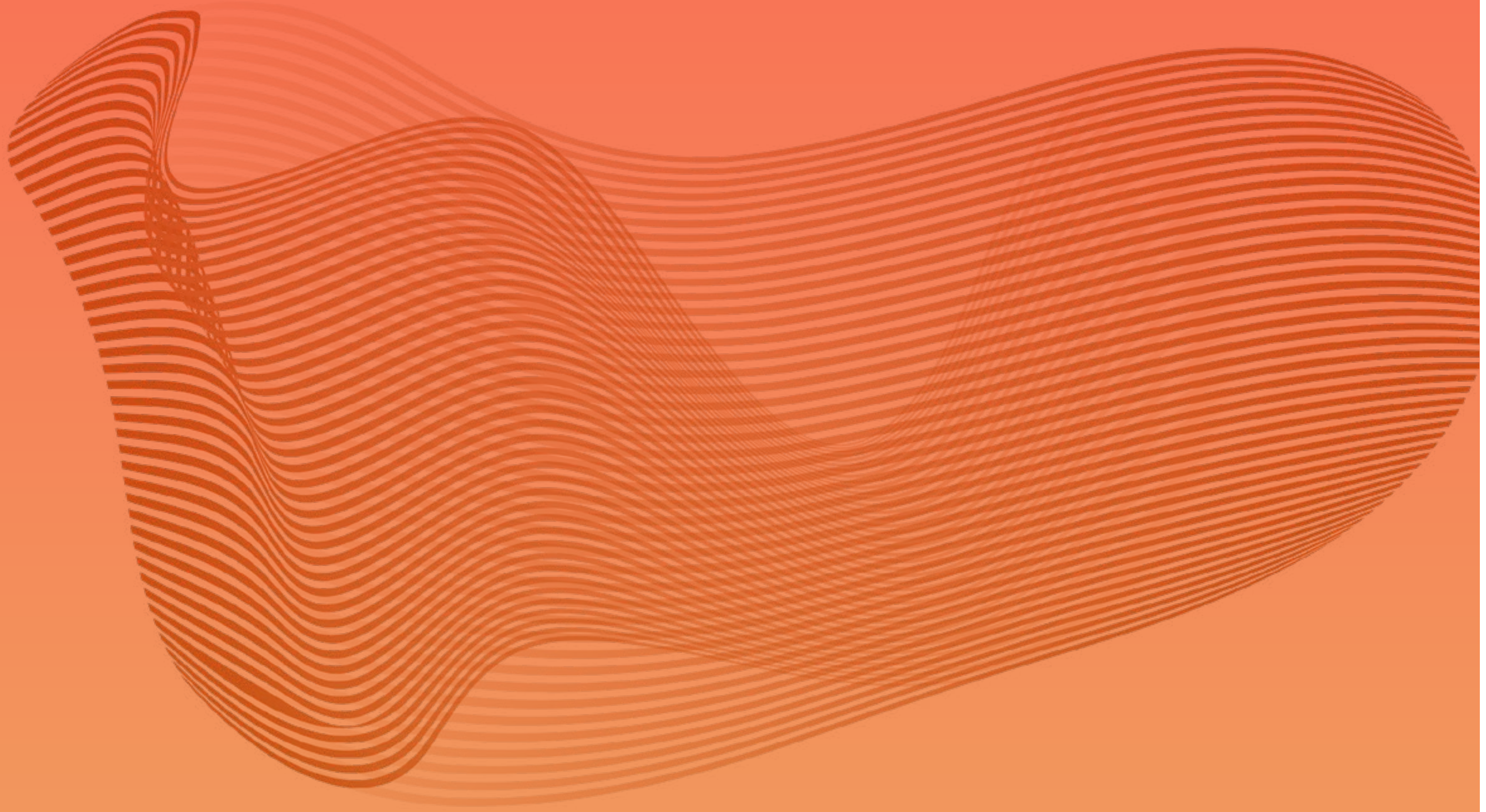
BRANDS & MARKETING

40

31

BRAND FANDOMS

Brands are leveraging the idea of fandoms to build deeper engagement.



Polly Pocket, Airbnb Icons. Courtesy of Kelsey McClellan

Fandoms move the world, shaping culture and informing lifestyles, and 65% of global gen Z and millennials would consider joining their favorite brand's fan club. Now companies are tapping into that power as a route to deeper consumer engagement.

Experts say that being a fan is rewarding, nurturing our need for identity, self-care, and social connection. The degree of commitment might vary, but almost everyone is in the game: according to research published in 2024 by YouTube and Smith Geiger, 85% of people aged 14 to 44 are fans of someone or something. As mass reach grows ever harder and people withdraw from the big social platforms, fandoms offer an alternative route to connection for brands.

Polly Pocket, Airbnb Icons. Courtesy of Kelsey McClellan

Colonel's
LODGE

In August 2024, Little Black Book posted its take on the impact of "brandoms" for the advertising industry, while research from social media marketing company Tint reveals 77% of people wish their favorite brands had a community.

The simplest route is to amplify people's passions. For years, McDonald's has been cheekily referenced in manga and anime shows as WcDonald's. In early 2024, the fast-food giant indulged in a little cosplay, creating a real-life WcDonald's immersive dining experience in West Hollywood, along with a themed menu and custom manga-themed packaging designed by artist Acky Bright. The move even extended to entertainment, with a four-part anime series produced in collaboration with Studio

Colonel's Lodge, KFC Australia

Pierrot, plus an animated music video for an original song "Want U Luv It" by Japanese singer Reol.

Mattel is now behaving more like a cultural property, crafting category-busting ecosystems of Barbie experiences and calling its audience fans. And streetwear brand Corteiz's unpredictable drops sell out in minutes thanks to a deft combination of hype and scarcity. In 2024, VML Intelligence also reported on the rise of branded escapes, with brands such as Taco Bell, KFC, and Rice Krispies serving up themed hospitality events, retreats, and lodgings to immerse devotees in their worlds.

Heinz's It Has To Be Heinz platform pays homage to fans' love for the brand, from sneaking Heinz beans into their luggage to getting a Heinz tattoo. The approach has delivered 12% global growth since launch in June 2023. In tandem with culture-surfing creative, the brand has also released merch including limited-edition sauces (such as Every Sauce, made from 14 Heinz sauces), a capsule fashion collection in partnership with Kate Spade New York, and a ketchup-hued paint co-branded with Lick.

Film production studio A24 has built a cult following with its savvy blend of content, creativity, and community. The studio has its own zine, podcast, fan membership scheme, and limited-edition movie merch drops that sell at elevated price points. Inspired by the 2023 *Priscilla* movie, A24 partnered with LA-based fine jeweler J Hannah on a $400 silver heart-shaped locket. For fans of *We Live in Time*, the studio announced its themed Andrew Garfield We Live in Kitchen Timer ($30) in October 2024.

These steps point toward brand fandoms but to transition completely, brands will need to consider co-opting the behaviors of their cultural counterparts, offering genuine participation, creative freedom, and peer community.

IT HAS TO BE HEINZ
EST 1869
IT HAS TO BE HEINZ
EST 1869

The Last Drop/It has to be Heinz campaign by Heinz

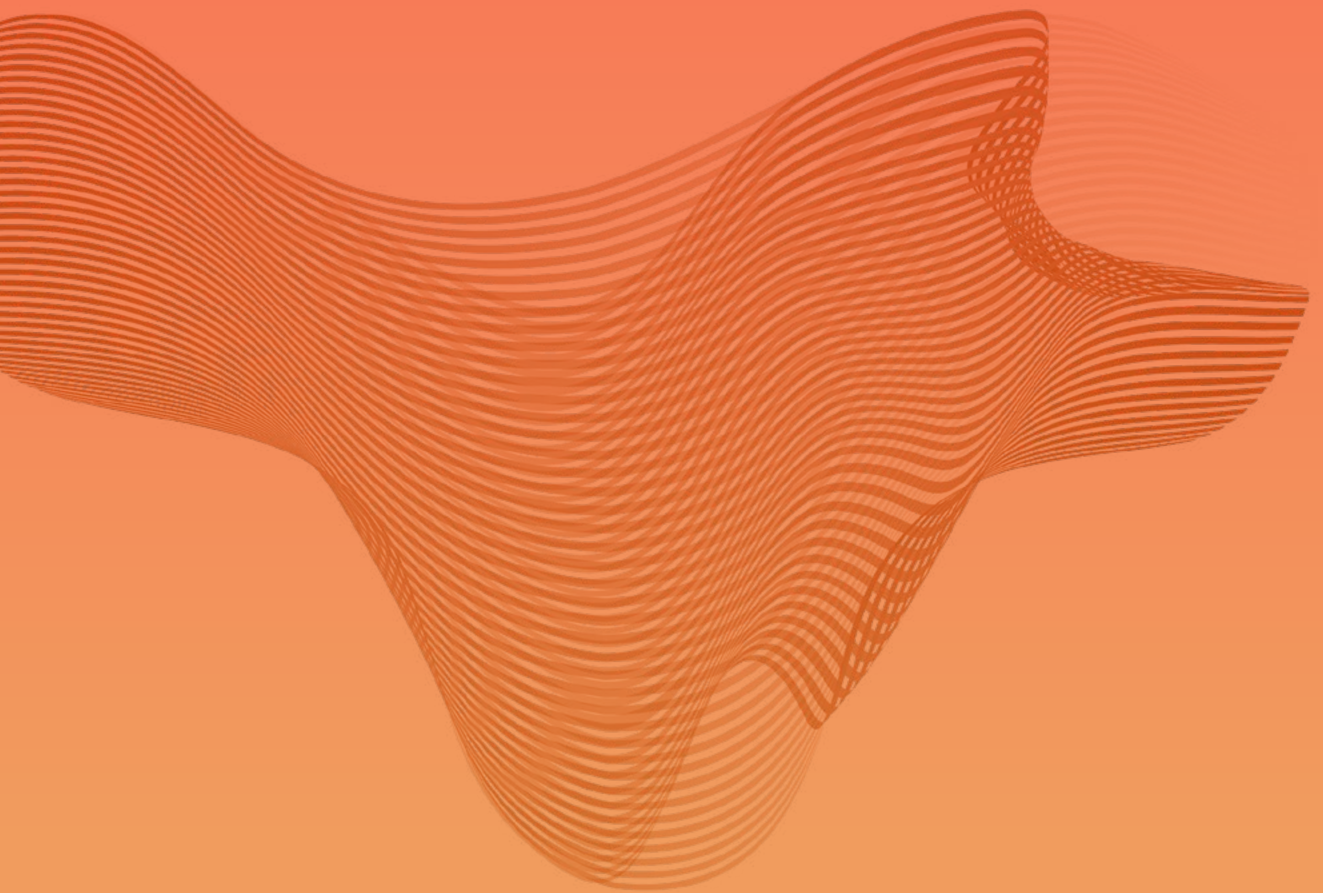
Why it's interesting

Some brands are beginning their evolution toward fandoms, seeking their own place in the cultural fabric. For those that can blend cultural relevance with connection and offer a sense of autonomy, fandoms are a potent opportunity, offering a highly invested, creative, and engaged community.

32

ASPIRATIONAL AGING

Society is developing a healthier relationship to getting older.



Brands have a longstanding obsession with youth. Their strategy in broad terms is target young people, ignore anyone over 50—and 65% of people globally perceive this as the case. But a quiet revolution is gathering pace, which goes beyond tokenistic efforts such as fashion magazines dedicating a single issue to older people.

Ex-advertising executive and consultant Cindy Gallop is bringing the subject of aging to the fore. She believes that marketers who still assume that everyone aspires to be young have got the formula back to front. “The mistake that marketers make is thinking old people aspire to be young—we don’t,” she explains to VML Intelligence. “Young people aspire to be like us. Because at this age, we don’t give a shit about anything. We know what matters, in friendships, relationships, family. We have our own sense of style, much more freedom, and more money. This is all aspirational stuff.” Over half of people (56%) agree that being older is aspirational and 73% say that age is nothing but a number.

Brands are starting to take note. Dove’s “Beauty Never Gets Old” campaign celebrated 67 years of the company’s Beauty Bar soap. It featured stylized shots of women over 60 and the dates when they started using the product.

In the film and TV industry, productions are pioneering age-blind casting, where people are considered for roles irrespective of how long ago they were born. In 2024, Sir Ian McKellen starred in a movie version of *Hamlet*—a role previously thought of as barred to older actors. In the world of theatre, Mia Farrow and Patti LuPone, two iconic septuagenarian actors, costarred in the 2024 Broadway comedy *The Roommate*. Mores around age and role are being recast—in fiction, at least.

> **THE MISTAKE THAT MARKETERS MAKE IS THINKING OLD PEOPLE ASPIRE TO BE YOUNG—WE DON'T.**
>
> Cindy Gallop, ex-advertising executive and consultant

Bill Kole, author of *The Big 100: The New World of Super-Aging*, tells VML Intelligence that people are living longer, and therefore are "purchasing more goods and services for a longer period of time. That cohort will represent a collective economic engine that will pour billions into our economy."

Why it's interesting

Marketers are obsessed with young cohorts. And yet senior demographics are where real wealth resides. The assumption that everyone wants to be young is getting old.

Kindred Uncommon residential community

33

REFRAMING DUPES

Brands are embracing dupe culture—and having some marketing fun along the way.

M McDonnell's
This is The Takeout Box
Created by McDonnel
A Chain Rest

McDonnell's popup by McDonald's

Proud gen Zers seeking a bargain are celebrating brand imitations and fakes, with 61% saying they often seek out cheaper dupes of brands or products they like. For years, counterfeits have been a thorn in the side of brands, but now some are embracing dupe culture and fueling a new wave of comedic campaigns.

Fast-food giant McDonald's spoofed its own brand with pop-up experience McDonnell's. In October 2024, for one day only, diners in LA could visit McDonnell's restaurant and sample the Chicken Big Mac, a twist on the classic Big Mac burger. "By tapping into some of our fans' biggest passions, from dupe culture to live streaming, we're able to serve up more than just a sandwich," says Tariq Hassan, chief marketing and customer experience officer at McDonald's USA.

In early 2024, dairy-free brand Daiya launched Fromage Forgery in downtown New York City, allowing people to sample its grilled "cheese" sandwich. "The beauty of contemporary dupe culture is that it opens high-end luxury to the masses," John Kelly, chief marketing officer at Daiya, explains. "This trend aligns with similar beliefs held at Daiya: that everyone is deserving of a bite of high-quality dairy-free cheese, and nothing should stand in the way."

Leaning in to the popularity of dupe culture, Elf invited other companies to replicate and join its efforts to make a positive impact on people, product, and the planet in its October 2024 "Dupe That!" campaign. In 2023, Hair brand Olaplex took a playful approach to the conversation when it created a spoof dupe of a product in its range, dubbed Oladupé, which the brand seeded to influencers. The campaign later revealed that Oladupé was, in fact, the brand's No. 3 Hair Perfector, and highlighted how Olaplex's 160 patents make it "truly undupable," the company's then-CEO JuE Wong explained.

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OLADUPÉ
THE ONLY GENUINE OLAPLEX DUPE
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REPAIRS AND STRENGTHENS JUST LIKE THE ORIGINAL
100 mL / 3.3 fl. oz.

Why it's interesting

Brands are joining the dupe culture phenomenon, giving it a modern, positive, and fun twist. Those willing to embrace the idea of imitations are also finding opportunity to democratize their products and offerings, giving them positive status among younger generations.

Oladupé by Olaplex

Champion
Daiya
MELTS LIKE DAIRY

Actor Lionel Boyce (The Bear) as Daiya's first Fromage Forgery salesman

FROMAGE FORGERY

Daiya Fromage Forgery dupe grilled cheese sandwich

34

BRAND SHOWMANSHIP

Brands can't afford the cost of dull—it's time to put on a show.

Advertising is going through a "dullocalypse," according to Eatbigfish's Adam Morgan, effectiveness expert Peter Field, and System1's Jon Evans. Launched at Cannes Lions 2024, the Extraordinary Cost of Dull research project revealed more than half of adverts tested as dull, triggering no emotional response whatsoever. VML data also reveals 72% agree that very few brands really stand out as different—they're all pretty much the same.

According to Morgan, Field, and Evans, brands might worry about the price of being creative but, in fact, there is a cost to being dull as neutral work is less impactful. For these ads to achieve the same market growth as work that is emotionally engaging demands additional investment in the region of $189 billion for US TV ads alone, according to System1 data.

What's driving the tedium? Some point to the role of technology allied with the quest for scale and efficiency leading to a kind of homogeneity. Speaking at Cannes, author Kyle Chayka noted that the internet's tendency towards "iterative culture," where anything that succeeds is scaled, "is not going to result in unique, interesting culture. It's going to result in the lowest common denominator."

"Dullness is costing businesses a fortune, but being dull is a choice," Morgan tells VML Intelligence. "Bland outputs come from bland inputs, so this is about both execution and strategy."

According to Orlando Wood, chief innovation officer at System1, showmanship drives brand, versus salesmanship that delivers short-term sales. While both are important, showmanship is linked to greater growth and profit. "Audiences are bored of being sold to," Wood wrote in the

THE DEHYDRATOR

Win a real jet campaign, Liquid Death

Business of Creativity newsletter. “It’s time the advertising industry remembered how to put on a show for them instead.”

Audiences agree. Three-quarters globally think brands should make more effort to be entertaining, while a similar proportion want brands to make more effort to “wow” them with their marketing (73%).

Morgan says this means delivering great, distinctive storytelling that connects emotionally and resonates with audiences, and challenges their assumptions. Brands should also be clear on the fight for attention. “People have got a lot on their minds, and they’ve got lots of things competing for their attention,” he says. “So, the real bar that we’ve got to beat in terms of being more interesting, is a much, much higher bar than many of us are currently setting ourselves.”

Orange won a Cannes Grand Prix in 2024 for its powerful “La Compil des Bleues” ad, which exposed how women’s football is held in lower esteem than men’s. Liquid Death sets a higher bar by hiring Netflix comedy writers, while Skittles’ “Apologize the Rainbow” campaign saw the brand turn customer complaints about a discontinued flavor into the most-awarded campaign of 2023. In October 2024, as its valuations were declining, Nike executives told investors that it too would invest in “bigger, bolder brand storytelling.”

Campaigns don’t need to be high-spending to deliver results, says Morgan. “Challengers show all the time that if you have small budgets you have to put on more of a show to cut through the sea of sameness,” he explains, and cites Lettuce Financial’s bold step of producing a musical ad which “outperforms anything else they’ve done.”

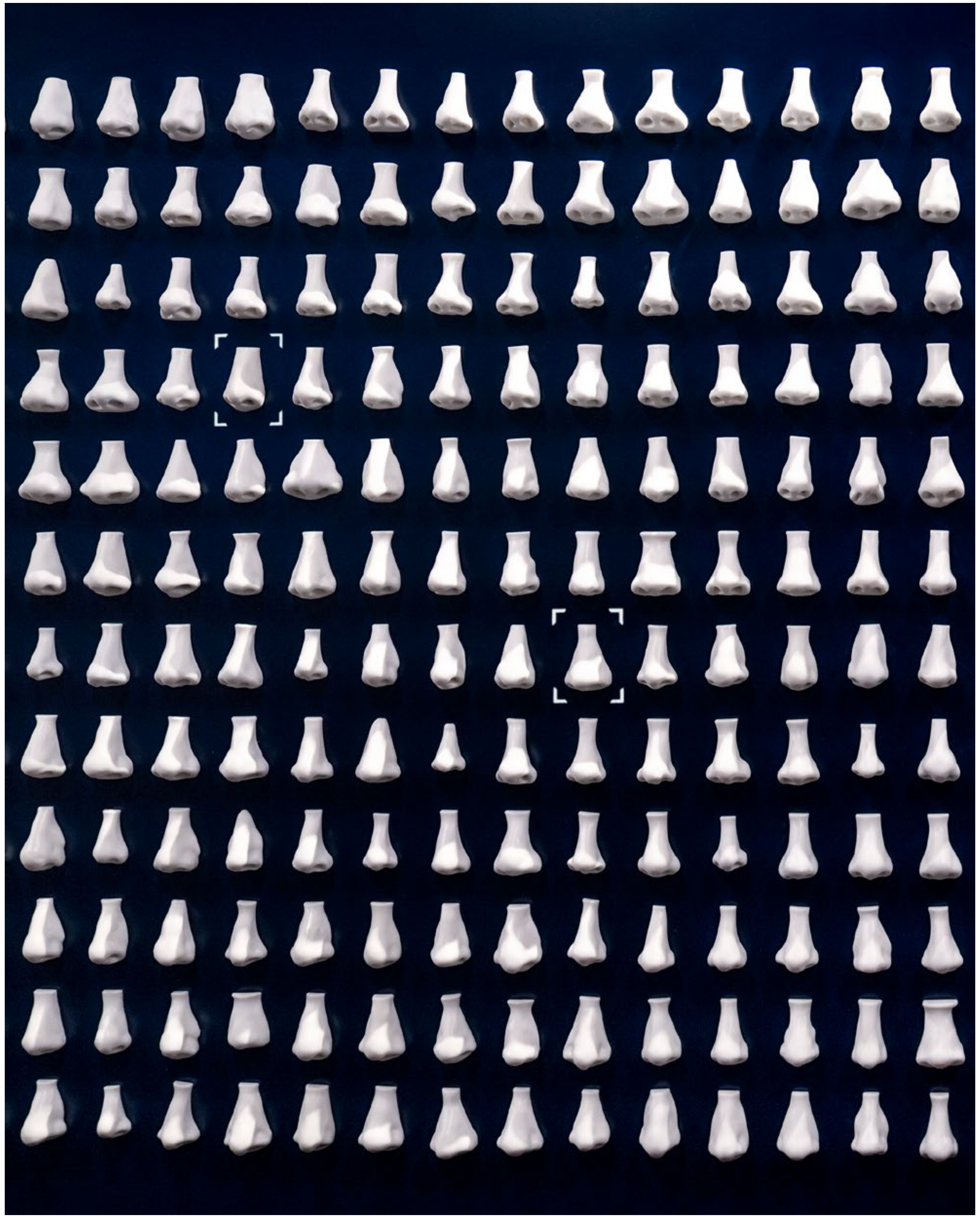
Why it’s interesting

To stand out in the age of average, brands need to fight against dull homogeneity. In the fight for attention, the competition is not just other advertising, it’s everything else people could be doing instead. It’s time to put on a show for audiences who want to be entertained.

35

SENSORY STORYTELLING

Sound, scent, and tactility create exhilarating experiences for consumers.



The Noseum by Tasha Marks at AVM Curiosities for Liberty. Courtesy of Kofi Paintsil

Sensory design has been permeating the digital space for some time, but brands, products, and designers are increasingly enriching storytelling by leveraging sound, smell, and touch in physical spaces and products. They're tapping into the 73% of global consumers who agree that brands should aim to engage all their senses.

Coinciding with Shanghai Fashion Week in October 2024, luxury outerwear brand Moncler hosted a spectacle which "scrambled the senses," according to *Vogue*. The City of Genius brought together 10 cocreators from the worlds of design, art, and music in a vast series of immersive events. Taking place in a 30,000-square-meter shipyard on the banks of the Huangpu River, it featured rain, sand, snow, willow trees, and orange groves, which enveloped visitors in a citrus mist. The 10 "neighborhoods" included *Vogue*'s global creative and cultural advisor Edward Enninful's extreme weather station—a multisensory experience of extreme conditions, including a "heat-showered sand dune and a mammoth iceberg."

Movie theaters are also adding sensory layers to the viewing experience. Alamo Drafthouse joined forces with Joya fragrance studio, using its atomization technology to resurrect "smell-o-vision" for screenings of A24's *Heretic*, in which a key plot point revolves around the scent of blueberry pie. At a key juncture in the movie, auditoria were filled with the scent of the dessert. The 4DX immersive theatrical format broke box office records in 2024 as cinemagoers sought out full-body viewing. Screenings included *Twisters*, which treated audiences to tornado-like wind and rain.

New York's Mercer Museum of Art and Technology is also transforming the way we experience art, with artist-creator Roy Nachum aiming for it to

The Noseum by Tasha Marks at AVM Curiosities for Liberty. Courtesy of Kofi Paintsil

be “felt,” not just viewed. The venue offers ultrasensory experiences using the latest cutting-edge technologies such as 4D sound and 8K projections alongside LED mirrored infinity rooms.

Scent designer and cofounder of AVM Curiosities Tasha Marks worked with Liberty London to create The Noseum, a permanent interactive and olfactory installation made up of 360 3D-scanned noses of Liberty customers and staff. Some of the noses release perfume molecules, enabling customers to get literally nose-to-nose with a perfumer for a unique experience of the fragrance.

According to VML data in 2023, 63% of consumers want brands to deliver multisensory experiences like this, with elements that engage their senses and make them feel present, grounded, and connected.

Marks believes the increase in multisensory content is partly a reaction to the growth of the digital sphere. “As our lives become increasingly digital, we crave more diverse sensory stimulation,” she tells VML Intelligence. “By employing smell, touch, sound, and even taste, you are creating a more visceral event that visitors have to be there in person to encounter. It brings people into the physical space and provides a more memorable experience. Ninety percent of my work is creating smells for museum and exhibitions, so the fact I have been brought into the commercial world at all is indicative of a shift in interest towards more interactive storytelling.”

Why it’s interesting

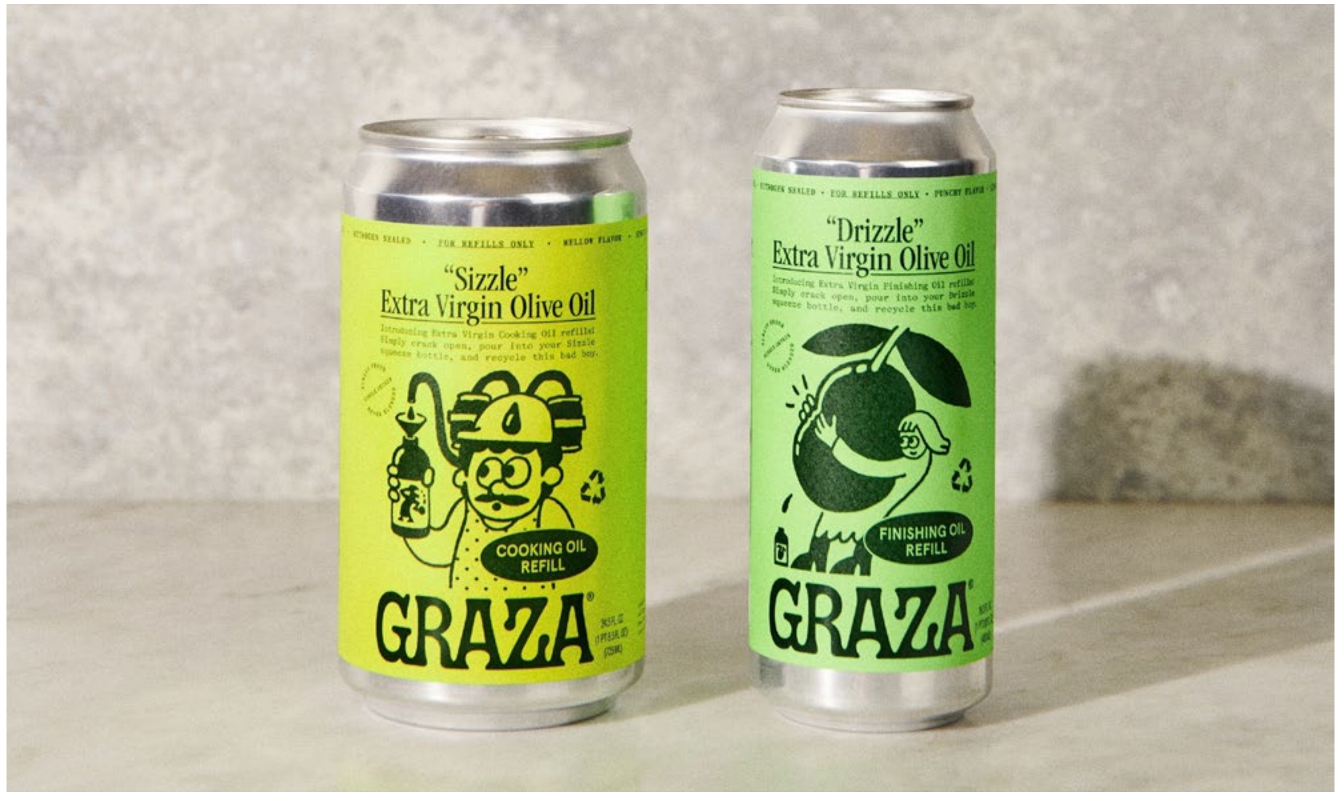
Sensory design offers brands a route to immersive, memorable experiences that uplevel storytelling, deepen emotional connection and engagement, and differentiate them from competitors.

Archetype, Dark Matter: Nightmare Before Midnight at Mercer Labs

36

CHAOS PACKAGING

Brands are using packaging to play with audiences’ expectations.


"Sizzle"
Extra Virgin Olive Oil
COOKING OIL REFILL
GRAZA
"Drizzle"
Extra Virgin Olive Oil
FINISHING OIL REFILL
GRAZA

Sizzle and Drizzle extra virgin olive oil by Graza. Image courtesy of Graza

Gravy in a beer can. Tampons in an ice cream tub. Coffee in a tube. “Chaos packaging” is leaping onto shelves in stores—and helping challenger brands cut through in a crowded market.

The term first emerged on X in April 2024 when Michael J Miraflor, an advisor and consultant, posted some visual examples with the caption: “I’m calling this trend ‘Chaos Packaging’ until someone comes up with something better.” The name stuck and so has the approach, with brands throwing out accepted designs from their categories and mixing it up.

UK cooking sauce company Potts’ Partnership was an early adopter. In 2019 it started using cans for its stocks and sauces, mimicking some of the design cues of craft beer. The result is a product that feels fresher and more dynamic than the incumbents it shares a shelf with, with better

> **I'M CALLING THIS TREND 'CHAOS PACKAGING' UNTIL SOMEONE COMES UP WITH SOMETHING BETTER.**
>
> Michael J Miraflor, advisor and consultant

recyclability than a plastic pouch or glass jar. The strategy is clearly working, as the brand announced plans in 2024 to launch in international markets.

Chaos packaging is a formula that works in myriad category combinations. Electrolyte cordial Oshun, launched in 2024, comes in a pump bottle similar to that of an up-market moisturizer. And Graza olive oil launched its beer-can-style packaging in spring 2024, featuring vivid green colors and thick-lined illustrated cartoon figures.

Nature lovers will be familiar with the joys of a fresh coffee in the open air—and the annoyance of bringing the necessary components with you. Employing chaos packaging for a functional purpose, No Normal is a dissolvable coffee paste, packaged in a toothpaste-style tube. Simply squeeze into your favorite camping mug, add water, and your caffeine hit is ready.

Flo
ORGANIC TAMPONS

Tampon company Here We Flo packages its products in biodegradable ice cream tubs. Aside from its playfulness, the concept contains an in-joke from cofounder Tara Chandra, who craves ice cream during her period.

Why it's interesting

A raft of challenger brands are coming to the fore, and they're trying to find cost-effective and playful ways to knock incumbents off their perch—such as spring water brand Liquid Death, which comes in a can. Entrepreneurs know they can't outspend bigger companies, so they must outmaneuver them instead.

Flo tampons by Here We Flo

37

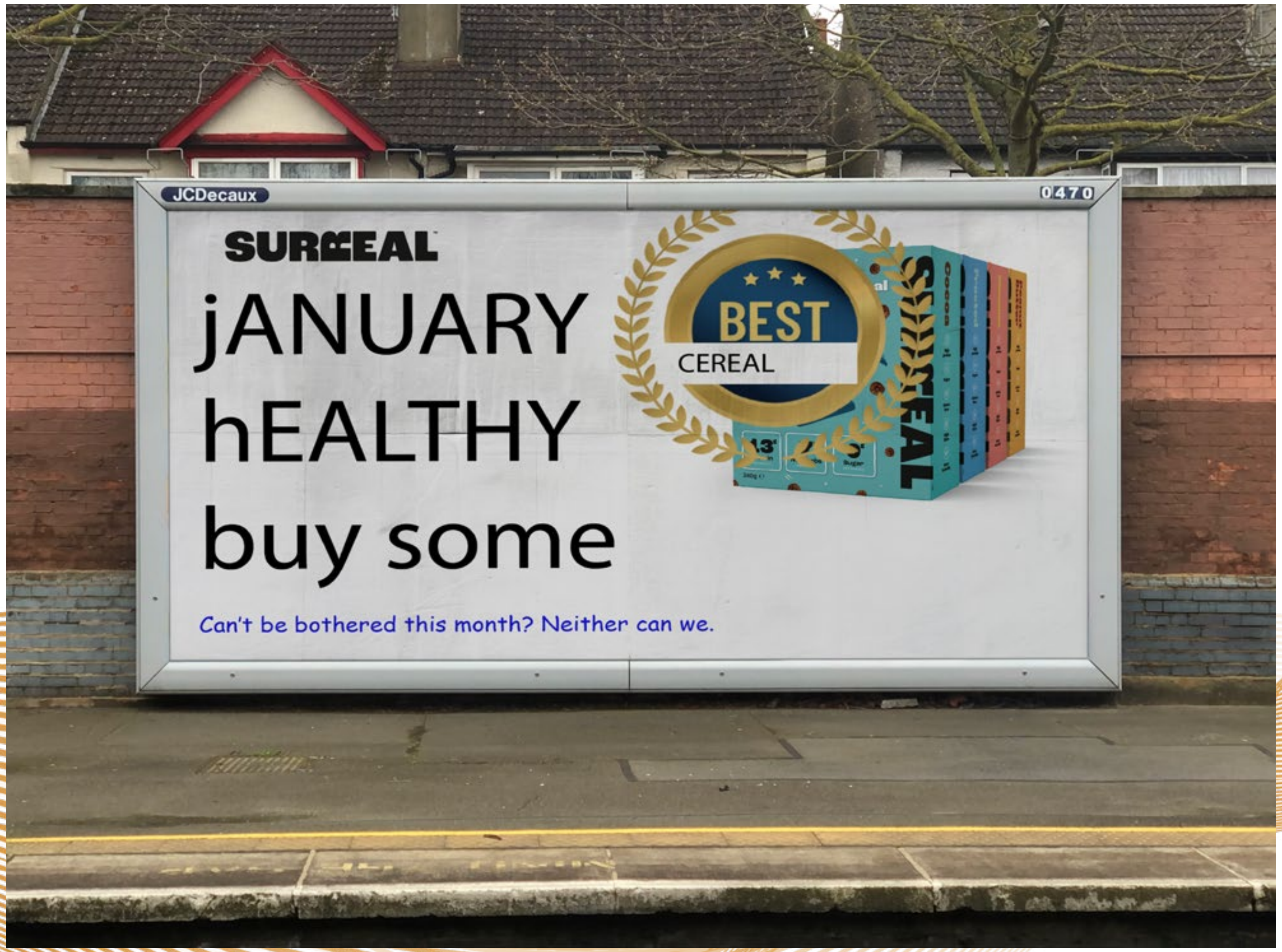
HUMBLE BRANDING

In place of grandiose claims, some brands are embracing the everyday while still packing an emotional—and humorous—punch.

“Is it even a city?” campaign, Visit Oslo

“I wouldn’t come here, to be honest,” begins Visit Oslo’s 2024 campaign “Is it even a city?” The spot features Halfdan, a jaded 30-something Oslo resident, bemoaning the city’s lack of “exclusiveness,” against the backdrop of the destination’s inviting vistas. “It’s not exactly the *Mona Lisa*,” he deadpans, against the backdrop of Edvard Munch’s *The Scream* in the city’s National Museum (which is notably devoid of crowds.) The tongue-in-cheek approach reflects how younger travelers are looking for more authentic, less mass tourism—60% of gen Z prefer “untouristed” destinations. As of January 2025, the ad had garnered a million views on YouTube.

Surreal cereal



For brands, trust is in short supply right now. Just 13% of people say they strongly trust the brands they use to share accurate information. Sean Pillot de Chenecey, author of *The Post-Truth Business*, which is being updated for release in 2025, tells VML Intelligence that it’s critical for brands to regain consumer trust. He calls it “the basis of all brand values, and therefore brands have an immense incentive to retain it.” This modest, authentic approach could help to restore some of that trust, and it is certainly resonating with consumers: 82% of global respondents say that they prefer advertising that is humble and does not make grandiose claims.

Just Eat’s 2024 “The Joy of Everyday” campaign featured 12 animal puppets enjoying Just Eat deliveries in a series of everyday moments. While these ads are finely crafted, the trend for more humble branding also touches on “ugly ads”—the idea that, now any content creator can achieve slick production levels, what feels unique is raw, unpolished authenticity. Surreal’s 2024 campaign for its high-protein cereals featured a home-made aesthetic, botched design, and misspelled copy with the tagline, “Can’t be bothered this month? Neither can we.”

At the 2024 Cannes Lions Festival, Marc Pritchard, chief brand officer at P&G, talked about the importance of “finding creativity in the everyday,” noting that simple products—from diapers to toilet paper—“offer huge opportunities, because everyday moments are rich with creative potential.”

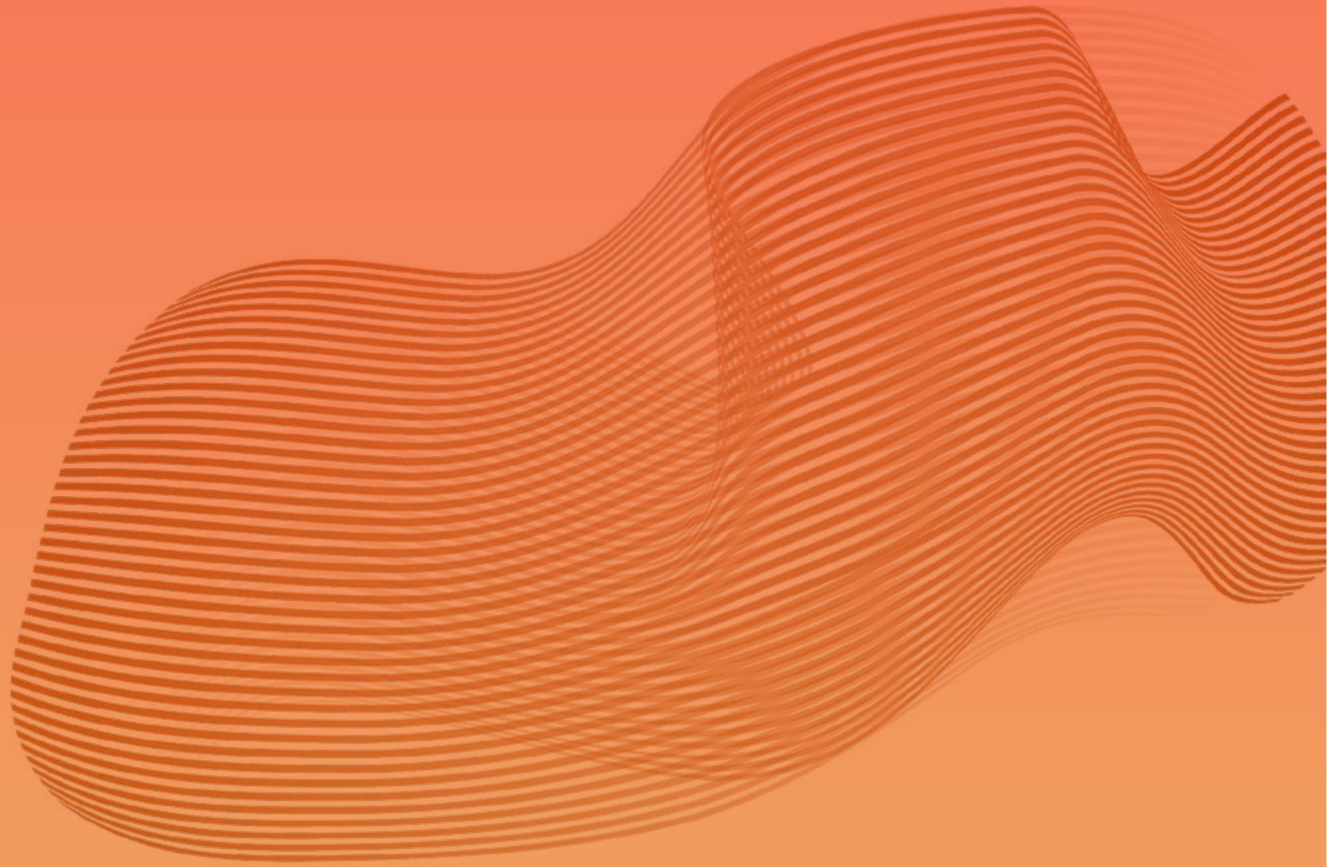
Why it’s interesting

The trend of elevating life’s more humble moments continues to play out, offering a movement toward emotionally relatable, humorous, and humble branding that engages with its sense of recognition.

38

NEW HIRING PARADIGMS

Brands are adopting creative tactics to hire and support a new generation of talent in the workplace.

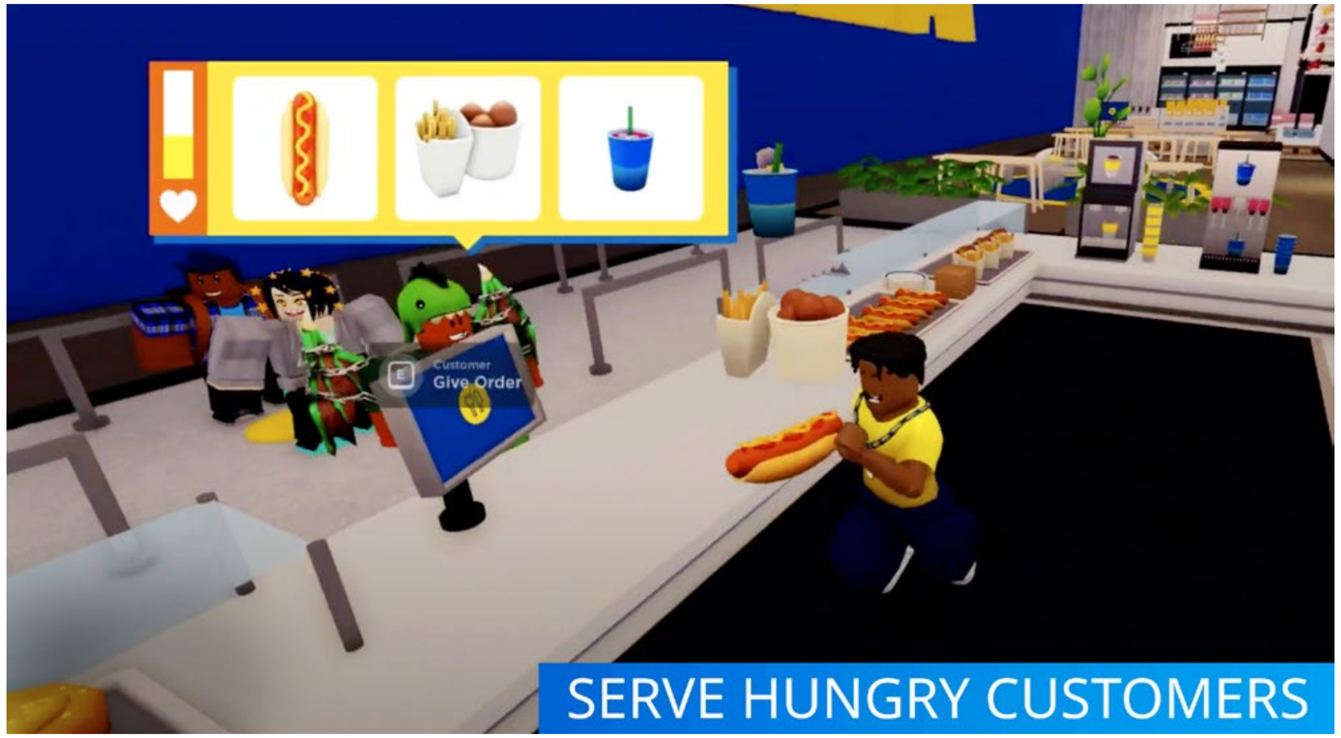


Employers are facing a global talent crisis. As the working-age population is set to contract by 25% on average over the next 20 years, according to a 55/Redefined report for Reed Talent Solutions, hiring managers are drowning in a sea of low-quality, AI-crafted resumes. Against this backdrop and in an increasingly competitive job market, some brands are helping applicants stand out from the crowd.

Pizza Hut launched its ResZAmes initiative, which prints applicants' resumes directly on a specially crafted pizza box and hand-delivers it, along with a warm cheese pizza, to the corporate headquarters of their choosing within New York City for free.

Some companies are turning to unconventional methods such as gaming for recruitment, in a bid to reach the right job candidates. In June 2024, Ikea launched *The Co-Worker* game inside *Roblox*, giving players the opportunity to "experience working in Ikea's virtual universe." Ikea recruited a team of 10 employees in the virtual store "to flex their skills, help customers, and get promoted to move departments, just like in the real world."

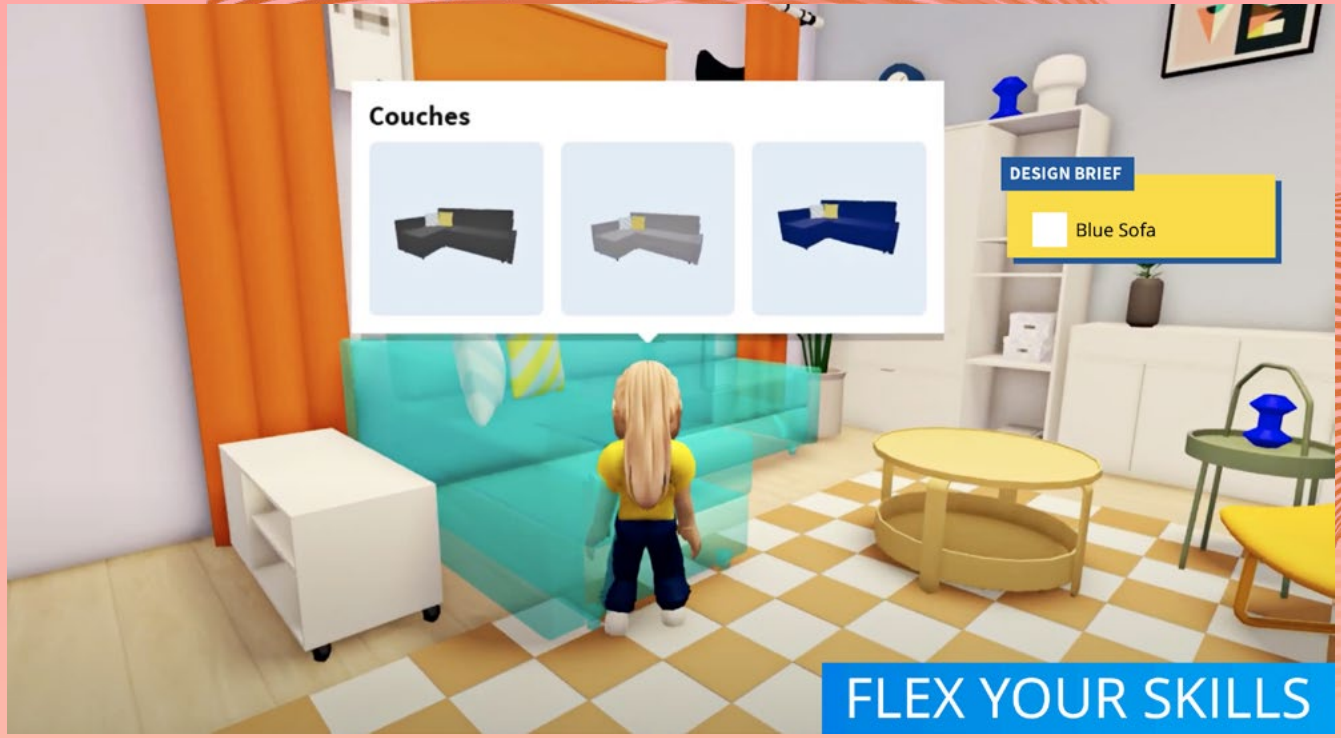
The *Financial Times* (FT) video "Recruitment is broken, what are businesses doing to fix it?" cites the example of Siemens, which has teamed up with recruitment company Arctic Shores for an approach that



The Co-Worker game on Roblox, Ikea

hires on aptitude rather than experience. Candidates complete AI-powered and task-based psychometric assessments that use results from interactive, non-job-related tasks to better match candidates to its vacancies.

Isabel Berwick is the host of the FT's *Working It* podcast and author of the *Working It* newsletter. She explains to VML Intelligence that she expects to see more gamification of recruitment "on one level because it works—Arctic Shores in our video has some compelling data behind it. On another, because generationally you are seeing hiring managers who grew up gaming. Think back to the heyday of *Second Life*, the virtual world, more than a decade ago. Lots of brands were in there, and there was talk of it becoming a 'virtual' place to work—and recruitment and doing your job there seemed likely to be part of that."



The Co-Worker game on Roblox, Ikea

Berwick also believes that "the 'macro' thing is a wider understanding about how gamification works across a lot of sectors and apps—many readers may be on *Duolingo*, for example, which rewards streaks. Beyond that, even, is the concept of LARPing [the way in which people try and show evidence of working, rather than actually doing it]. Lots of people are aware of this performative aspect to our work and perhaps live it out, even if it is unconscious."

Why it's interesting

Increasingly, employers will need to assess skills differently and creatively to attract new sources of talent. They will also need to recalibrate their own digital skills and ensure their brand is on point in the marketplace. "Look at the rise of CEOs going direct to LinkedIn," says Berwick. "They are speaking to the talent pool on there."

39

MADE BY HUMANS

The competition between AI and humans heats up in the battle for creative output.

When ChatGPT launched in 2022, technology zealots were agog at the new capabilities of the tool, while creatives worried they'd soon be out of a job. As with many innovations that promise to reinvent the world, the impact is rarely predictable (remember Blockchain?). Generative AI hasn't composed a hit song, written a bestseller, or come up with an idea for a game-changing campaign—at least, not yet.

Very few people wish for AI to replace human creativity (see The curator economy, page 49). *The Last Screenwriter* is a feature film directed by Swiss filmmaker Peter Luisi, who entrusted the script to ChatGPT. Meta in the extreme, the story is about a writer who discovers a cutting-edge bot that becomes a better storyteller than the main protagonist. The London premiere of the film was scheduled for June 2024, but was called off after industry backlash. Distaste for AI-generated content is evident in advertising too. Also in June 2024, Toys'R'Us made a comeback with its AI-generated ad using OpenAI's Sora. *Fast Company* called the ad "creepy" and *Ad Age* reported one creator describing it as "an abomination."

This backlash is reflected in the global sentiment that less than half (47%) of people would watch a movie starring AI-generated actors. Ultimately, despite advances in tech, creativity centers around humans—76% of people firmly believe technology will never take creativity away from humanity.

Some brands are taking a decisive stance not to use it at all when it comes to creative campaigns. In April 2024, *Ad Age* reported that H&M is restricting AI use for content production in its advertising, and Dove vowed to never use AI to represent humans in its campaigns (see Algorithmic beauty, page 145). This approach aligns with over half (53%)

of people who say they would be disappointed if they found out a brand had used AI to make an ad.

Sir John Hegarty, cofounder of Bartle Bogle Hegarty, runs The Business of Creativity online masterclass, which teaches business leaders to use their imagination. He has been watching the interplay between AI and art closely. “Creativity is fundamentally an expression of self,” Hegarty tells VML Intelligence. “How does a machine do this? You could program in a set of parameters, but it doesn’t have a depth of feeling, or real experiences to draw from. An AI can’t walk down the street and absorb things.”

Why it’s interesting

Innovations rarely change the world in the way that we imagine. So it is for AI. Brands should remember that an AI tool is a way to improve and augment creative work, rather than carry it out for us.

The Last Screenwriter, a feature film written by AI

40

BRAND BELONGING

With loneliness becoming a major problem, brands are tackling social isolation.

Beavertown x CALM. Courtesy of Here Be Dragons

It is a modern paradox. As Monika Jiang, founder of the Sharing Our Loneliness initiative, puts it: “We live in a very connected and very disconnected time.” Loneliness is starting to be thought of as a contagion, and Jiang tells VML Intelligence that it is not only a personal and health concern, it also extends into societal and political issues. Sixty-seven percent of people believe loneliness is an epidemic and 70% say there is no sense of community anymore.

Brands are taking steps to alleviate the loneliness epidemic. In Spain, Milka partnered with Cruz Roja (the Red Cross) for the “Tenderness Against Loneliness” short film, which featured real people and brought to life the experience of feeling isolated. Skincare company Nivea launched its Nivea Connect initiative in September 2024, promising to fight the issue of social isolation by funding research, using its brand channels to publicize the issue, and running programs in 40 countries by 2026.

In a more interventionist move, beer brand Beavertown introduced special stools into nine UK pubs to encourage people to strike up conversations with strangers. And the brewery isn't stopping there—it has also unveiled a partnership with mental health charity Campaign Against Living Miserably (CALM) to fight feelings of isolation. In Hungary, Vodafone launched the "Granny Office" campaign, inviting grandparents to upgrade their broadband connection and turn their homes into offices for their grandchildren to work from.

"Brands can definitely play a positive role in the loneliness epidemic because they are built around shared values," says Bas Korsten, global chief creative officer for innovation and cochief creative officer for EMEA at VML. He suggests that "instead of offering discounts, they could be offering 'belonging': genuine connections between people who share the same value set."

A raft of startups is also forming around loneliness. Papa is an app that helps connect people (particularly seniors) with a Papa Pal for companionship, assistance with errands, and transportation. And No Isolation rolls out services designed to help with loneliness, such as its AV1 ed-tech product directed at children who must—for one reason or another—take long absences from school. A small robot avatar allows children to observe and participate in classes when they're in another physical location.

Meg Elkins, a behavioral economist and senior lecturer at RMIT University, tells VML Intelligence that people crave connection, and brands that create a "caring connection" will resonate better with consumers. "Strava, for example, takes a community-first approach and then builds the product," says Elkins. "I feel like that's the future. If you want to be successful, get a community first."

Why it's interesting

Brands are in a prime position to reduce the isolation that many people feel, and should look to build on community and provide people with the priceless sense of belonging.

AV1 robots by No Isolation. Courtesy of Markus Haner

41

FOOD & DRINK

50

41

IMAGINED WORLDS

Abstract, fantastical flavors are reinvigorating food and drink brands with a sense of transportive wonder.

Nebula Berry from the Punk Stargonaut collection by Jeni's Splendid Ice Creams

From Oreo's limited-edition Space Dunk cookie, stuffed with a layer of blue and pink "cosmic crème," to CosMc's French Toast Galaxy Latte, new for fall 2024, food and drink brands are challenging our palates with products that promise the taste of space and beyond—transporting us to imagined worlds in the process. Syrup maker Torani has recognized the current appetite for fantastical flavors, naming its Puremade Galaxy Syrup as its 2024 flavor of the year.

"We're leaning in to the fantastical creation of worlds and creating a level of escapism," Beth Stallings, director of innovation and communication at Jeni's Splendid Ice Creams in the United States, tells VML Intelligence. Describing the launch of the brand's Punk Stargonaut collection, which re-imagines a fictional journey into space, she says: "Jeni's pulls inspiration from anywhere—even a Matisse painting—because when it comes to desserts, you're looking to feel a certain way. Gen Z and gen alpha are actively seeking out the strange, surprising, and unique."

In 2025, Rasmus Munk of Copenhagen's Alchemist restaurant will team up with SpaceVIP for Space Perspective voyages, offering a six-hour dining experience at $495,000 per ticket. In Dubai, Zenon restaurant combines mythical flavors with AI entertainment for a "culinary adventure like no other."

Bubble tea shops continue to expand outside China with ever more complex flavors and unexpected brand tie-ups, and the global bubble tea market was valued at $2.46 billion in 2023, according to Fortune Business Insights. With over 4,000 stores across 300 cities around the globe, behemoth HeyTea heralded its UK launch with a collaboration with the English Royal Ballet and Opera. It included a limited-edition three-layer tea—with chocolate cheese foam, brown sugar boba, and red blossom milk tea—demonstrating that fantasy flavors aren't just about taste but also offer an immersive, imaginative escape, allowing people to indulge in something whimsical, nostalgic, or entirely new.

jeni's
ICE CREAM
SUPER MOON
jeni's
ICE CREAM
NEBULA BERRY
jeni's
ICE CREAM
PURPLE STAR BORN
jeni's
ICE CREAM
COSMIC BLOOM
SPACE DUST
PUNK STARGONAUT

Punk Stargonaut collection by Jeni's Splendid Ice Creams

Why it's interesting
Playful, humorous, and mood-enhancing fantasy flavors for food and drink are a form of accessible, quotidian escapism, and talking points that can be shared with family and friends.

42

NEW CULINARY INNOVATORS

Visionary chefs ditch restaurants for laboratories and education.

Copenhagen's Noma, repeatedly named the world's best restaurant, will close its doors in spring 2025 to relaunch as a test kitchen "dedicated to the work of food innovation and the development of new flavors." Noma is transforming into a full-time food laboratory, focusing on developing new dishes and products for its ecommerce operation, Noma Projects. The dining rooms will only be open for occasional pop-up events, and the role of the chef is being reimagined as akin to that of a chief creative officer.

This shift occurs against a backdrop of increased attention around the intense pressures faced in high-end restaurant kitchens, as depicted in recent films such as *Boiling Point* and *The Menu*. "We have to completely rethink the industry," Noma chef René Redzepi told the *New York Times*. "This is simply too hard, and we have to work in a different way… It's unsustainable. Financially and emotionally, as an employer and as a human being, it just doesn't work." Many restaurants and chefs are now exploring alternative paths to navigate the industry's challenges and seek out new inspirations.

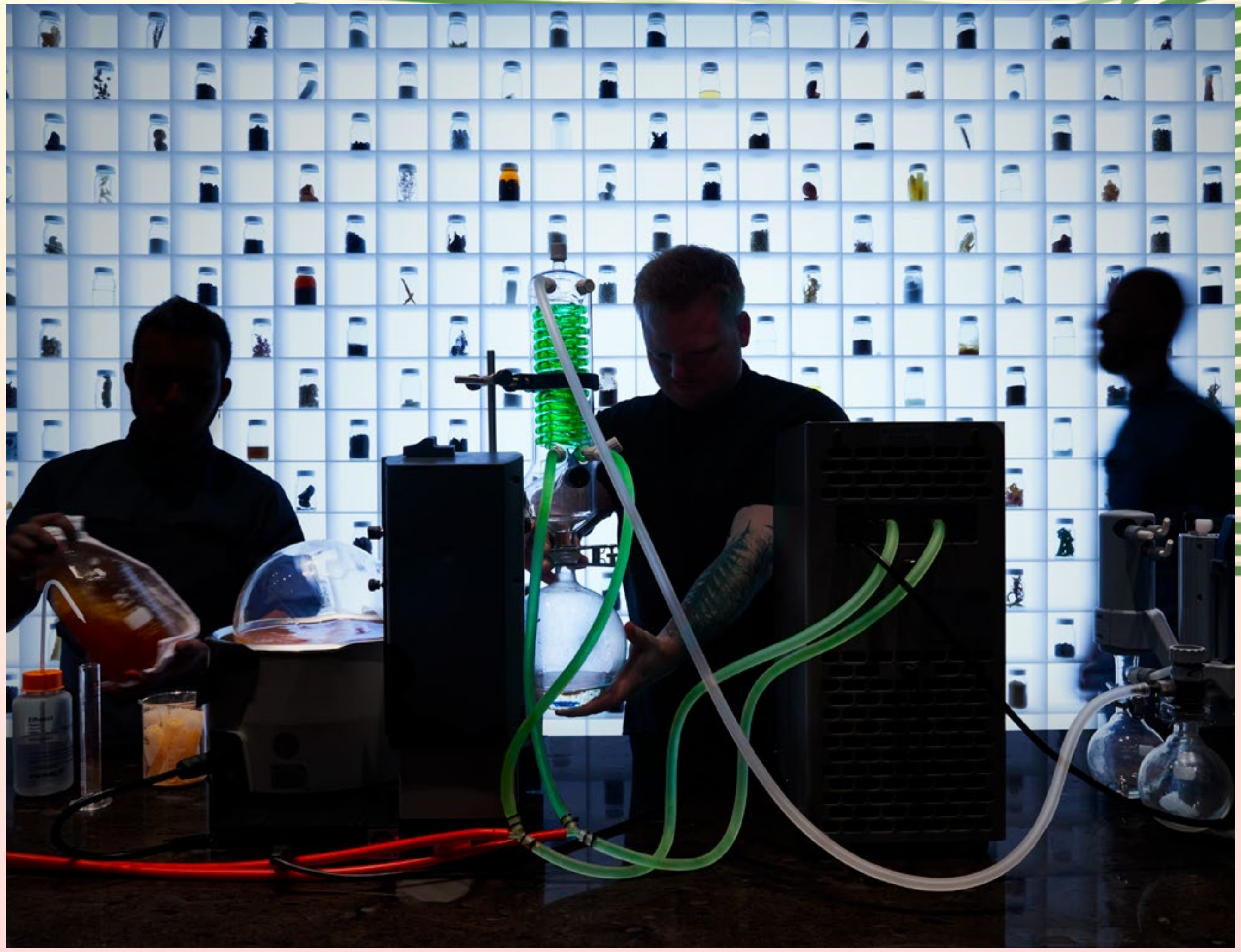
Silo, an established name in this space, has launched its Fermentation Factory to supply other restaurants and address the problem of food waste, from both a cost and environmental standpoint. According to its Kickstarter campaign, it plans to cultivate large quantities of koji, "a preparation that has both ancient roots and a firm footing in the future of food waste," and a key ingredient found in miso, soy sauce, and fish sauce.

Rasmus Munk, the chef behind Copenhagen's Alchemist restaurant, has established an independent innovation center in Denmark called Spora. It is dedicated to the development of sustainable culinary products that

have a positive impact on the lives of millions of people. Initially, the focus will be on two main areas: upcycling side streams from the food industry and developing "delicious and diverse protein sources."

André Chiang, one of the most accomplished and celebrated chefs in the Asia-Pacific region, announced his retirement in July 2024. His two-Michelin-star restaurant Raw continued to operate as a traditional dining establishment until December 31, 2024. In an interview with VML Intelligence, Chiang reveals that Raw will transform into an educational institution dedicated to training the next generation of culinary talent.

Taste Buds membership by Noma



Starting this year, Raw will function as a cooking center, accepting applicants from around the world and offering both foundational courses and advanced training, with the goal of nurturing 10 to 20 Michelin-standard chefs each year.

Why it's interesting

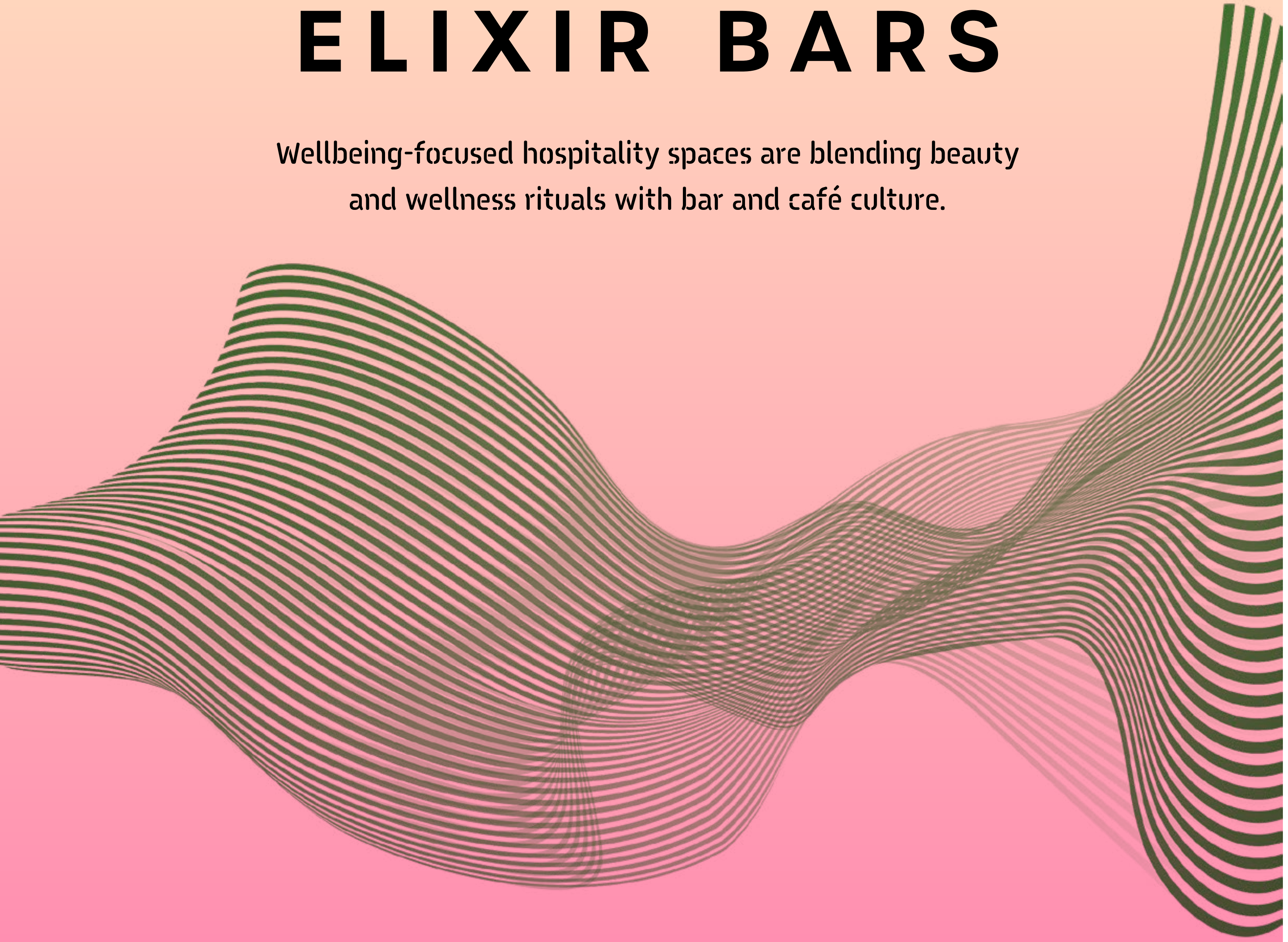
The shifting culinary landscape reflects a profound transformation in how chefs view their roles and the future of the industry. This could see elite fine dining become even more select in the near term, while pushing the boundaries for the industry more broadly.

Research lab Spora

43

ELIXIR BARS

Wellbeing-focused hospitality spaces are blending beauty and wellness rituals with bar and café culture.



Bar Spectre

Apothecary-inspired Bar Spectre in Singapore is making mental wellness the focus of its experience via intentional rituals and natural ingredients. Customers are invited to write down something that is on their mind on a piece of paper that they then burn, reflecting the wellbeing practices of journaling and fire cleansing. Drinks lean into Chinese traditional medicine with ingredients such as roasted oolong tea and savory roots, and are paired with therapy techniques, activities, or thought starters to encourage focus on their wellbeing.

“People come to bars to feel better or to nurture relationships,” owner Andrew Pang tells VML Intelligence. “We think a more intentional approach to hospitality best supports this. We’re not therapists, but we aim to lower the barrier to entry to therapy and therapeutic activities.”

Bar Spectre speaks to a wider trend, as progressive and alternative approaches to wellbeing elevate the hospitality experience. The wellbeing-focused 48 Collagen Café in Paris, created by beauty consultant Amandine Fornot, offers a $26 experience that merges café culture with beauty treatments. Visitors can sip a collagen latte while wearing a red-light therapy mask to maximize the benefits of both. The nearby Belleyme “sauna café” sells “beauty food” and “healthy coffees” alongside 30-minute infrared sauna sessions, while at the Fushigi no Heso bar in Shinjuku, Tokyo, owner Mr Endo hypnotizes patrons to help them access different levels of consciousness.

Why it’s interesting

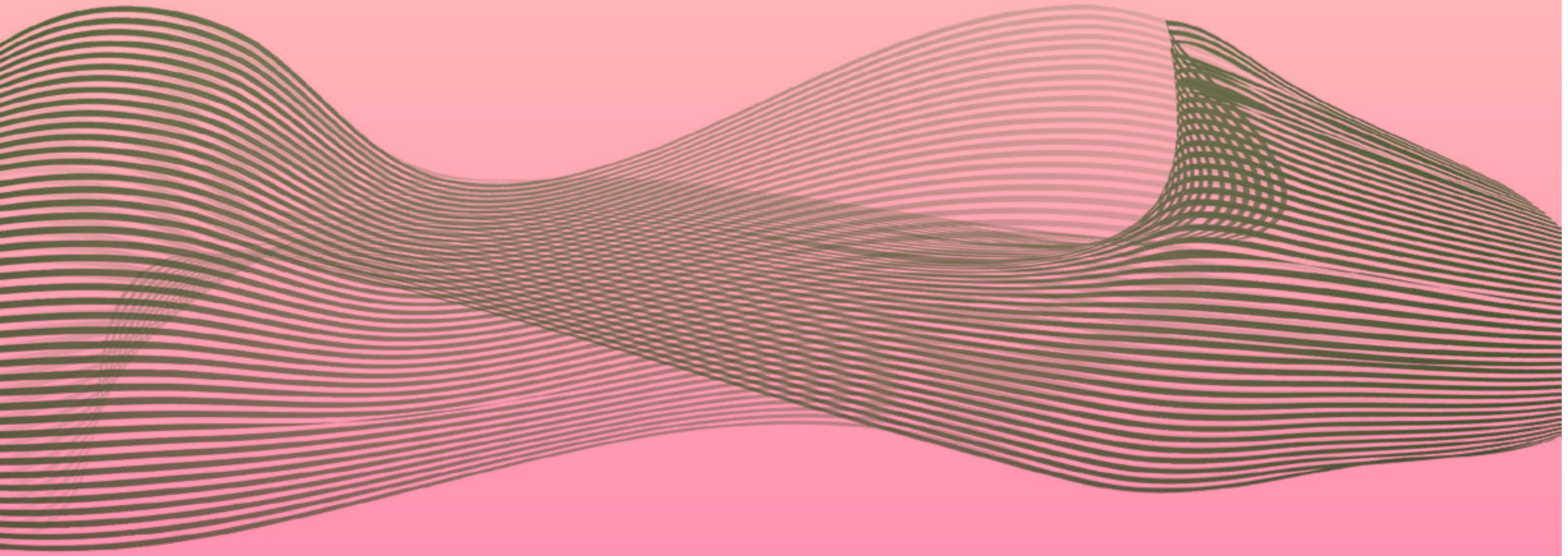
The boundaries between beauty, wellbeing, and food and drink are blurring. Hospitality brands must consider how they can fuse elements of each to meet the demands of wellness-focused consumers.

Bar Spectre

44

REALITY-DEFYING DINING

Restaurants and bars are pushing the boundaries of food and drink with out-of-this-world dining experiences.

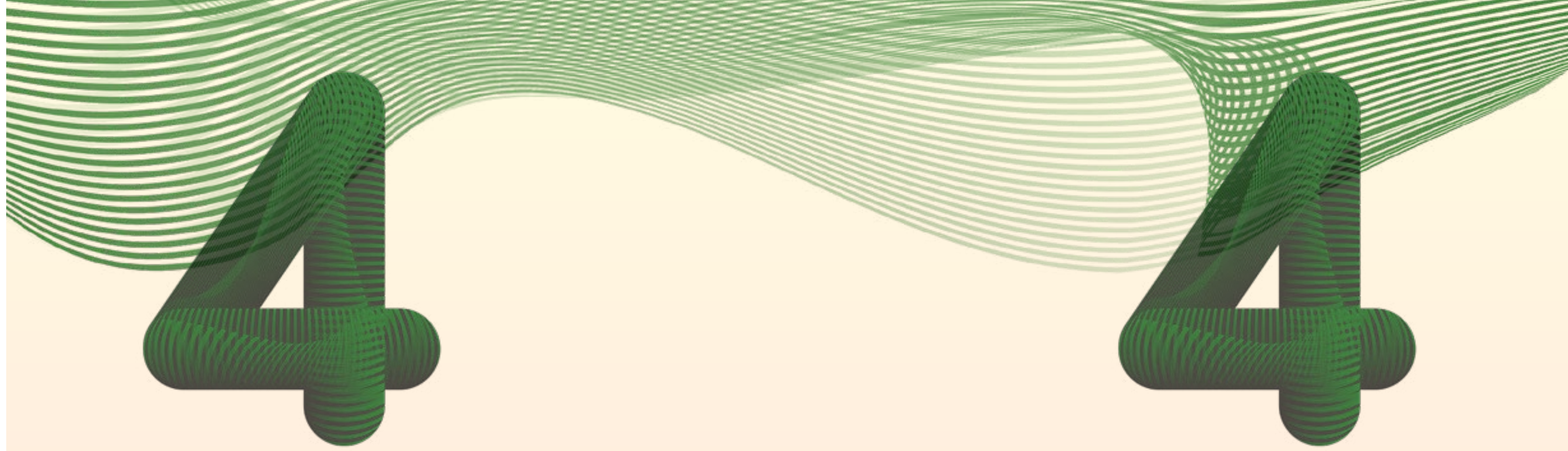


The Levitating One cocktail by The Alchemist

“The Age of Re-enchantment” report from VML Intelligence found that three-quarters (76%) of global consumers “agree that when something is magical it allows them to escape from the mundane,” while two-thirds “prefer to spend time in places that spark my imagination.” Restaurants and cocktail bars around the world are rising to this challenge by creating elevated, awe-inspiring dining experiences that challenge the perceptions of our senses.

In the United States, Michelin-star chef Enrique Limardo’s Surreal restaurant in Arlington, Virginia, promises an environment “where dining transcends reality.” All dishes and cocktails include “surprises that go beyond appearances,” as general manager Amber Potter tells VML

Mixology at Surreal by Enrique Limardo



Intelligence. “Providing guests with imaginative culinary experiences elevates dining into a memorable, emotionally resonant journey that engages the senses, fosters connection, and distinguishes a brand.”

In spring 2024 UK cocktail bar The Alchemist pushed the boundaries of reality with the launch of The Levitating One, a Manhattan-style drink that floats above the table, propelled by an electromagnetic base. Fitz’s Bar at London’s Kimpton Fitzroy Hotel has launched the Spectrum cocktail menu, which is inspired by synesthesia, a physiological condition where the stimulation of one sense impacts another. Each drink has an intense color, which is said to play with drinkers’ perceptions of taste, and leverages what bar manager Massimiliano Bosio described to *The Drinks Business* as “the sensory magic of synesthesia.” In the years ahead, emerging technology will multiply the possibilities of reality-defying dining.

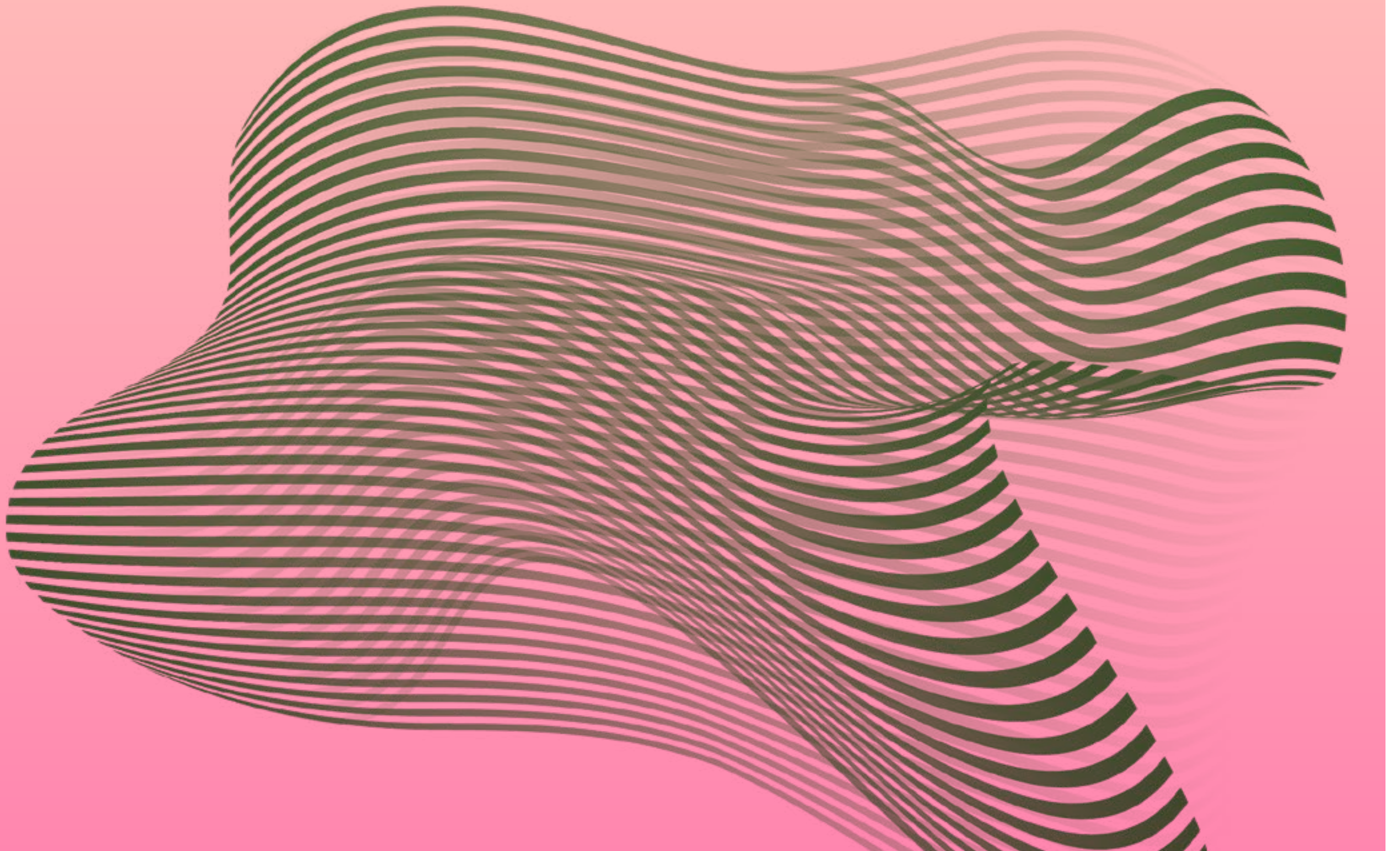
Why it’s interesting

As consumers are increasingly looking for culinary experiences that are new, unique, and exciting, reality-defying products that challenge the perceptions of our senses can help food and drink brands meet these elevated expectations. In the future, advances in tech could further bend reality.

45

CIRCADIAN SNACKING

Sophisticated, functional food is being optimized to meet the needs of the body's fluctuating daily rhythms.



In this era of precision nutrition, consumers aren't only thinking about what they eat, but also when, and in what order. The *New York Times* reported that nutrient sequencing—the act of eating fiber-rich vegetables first during a meal, followed by protein and fats, and then carbohydrates—is becoming a recognized way for people with Type 2 diabetes to better manage their blood-sugar levels.

In Japan, companies are exploring the potential of "chrono-nutrition" or nutrient timing, which ensures that consumers are getting the right energy support and doses of health-focused ingredients such as protein and fiber at optimum moments throughout the day. Functional food start-up Dot.me has partnered with 7-Eleven Japan on the Cycle.me range of food and drink. Each product's packaging states the best time to consume it, from morning to daytime or night. "Research is on-going, but we're starting to understand more about supporting our internal body time, knowing what our bodies need most at different times," Dot.me founder Takayoshi Jonathan Chinen tells VML Intelligence. "People want to be healthy, but it can be confusing. Cycle.me makes it easy for people to turn energy on and off, with added health elements to support the life cycle throughout the day."

Shiseido's new collaboration with vegetable-juice brand Kagome is also inspired by the body's biological clock. Launched in early 2024, the Rootina beauty drink range includes two products, Sun and Moon, which each contain "ingredients that are optimal for both morning and evening rhythms."

With McKinsey valuing the global wellness industry at $1.8 trillion and the functional food and beverage market expected to grow at a CAGR of

10.23% through to 2032, according to Fortune Business Insights, health-focused consumers are starting to get even more serious about how they eat.

Why it's interesting

"There are some very advanced health consumers with very good nutritional literacy," reveals Chinen. "But there is a gap between these people and the majority, who need help to make the right choices." As consumer expectations for precision nutrition grow, brands must play a key educational role.

> WE'RE STARTING TO UNDERSTAND MORE ABOUT SUPPORTING OUR INTERNAL BODY TIME, KNOWING WHAT OUR BODIES NEED MOST AT DIFFERENT TIMES.

Takayoshi Jonathan Chinen, founder, Dot.me

Dot.me Cycle.me

46

MULTIPLEX FLAVORS

A global flavor revolution is underway.

Nando's x Fanta wing combo meal

Flavors are getting increasingly bolder as consumers crave newness and experience in their food and drink. According to Innova Market Insights, one in three global consumers are intrigued by new, unique, and different flavors, while one in four are now attracted to "interesting and exotic global flavor combinations."

Mass and luxury brands alike are responding to this demand. The 3.0 Cookbook menu from London-based cocktail bar Lyaness, voted the best in the world by *The Pinnacle Guide*, features 18 bespoke, one-of-a-kind ingredients, such as Tattie Gold, "made from a combination of confit potatoes in saffron butter emulsified with a rich honey syrup." The drinks list includes the Kentakki Fried Cocktail, inspired by the Japanese tradition of eating KFC at Christmas. "We wanted to strip back and focus on something that's inherent to the food world but often misunderstood, and that was simply 'flavor'," reveals creator Ryan Chetiyawardana.

Soumya Nair, global director of consumer research and insights at nutrition innovator Kerry, posits that a key driver behind this demand is "the global exchange and dissemination of tastes and flavors through social media and travel." Another is the demands of younger consumers. Mintel's 2024 "Gen Z Beverage and Flavor Preferences" report found that 46% of gen Zers in the United States want exciting flavors.

Fast-casual chicken restaurant Nando's is serving up bold flavors with a guest spice based on a Nando's x Fanta mashup. The brand describes the fruity spice, designed to complement its chicken wings, as "if Nando's and Fanta Orange Zero had a baby. Literally."

US college caterer Chartwells Higher Education (part of Compass Group) is also seeing a demand for innovative twists on classic dishes and unexpected flavor combinations. Its Mango Chamoy Ice Pops, for example, use the classic Mexican condiment made from pickled fruit, chillis, and lime. Sarah Bodner, research and development executive chef, confirms that "the popularity of chamoy pickles highlights a growing interest in bold, sweet, and spicy flavor combinations that resonate with gen Z's adventurous palate."

Why it's interesting

The consumer demand for bold, complex, and unique flavors is inspiring innovation across all areas of the food and beverage industry. At a time when 30% of gen Z are cutting back spending on themselves, bold flavors and tastes offer a way for brands to make products irresistible.

Nando's x Fanta spice wings

47

AGRIHOODS

People are embracing the lifestyle advantages of rural farm-based living.

Fox Point Farms, California. Courtesy Stephen Whalen

In North America and beyond, people are embracing a new way of living that rejects fast-paced modern life in favor of the community, lifestyle, and local food abundance that comes with settling near a farm. According to the Urban Land Institute, there are now 200 agrihoods, or "agricultural neighborhoods," in the United States, defined as planned communities built around a working farm.

Fox Point Farms in Encinitas, California, opened in 2024 as a 21-acre mixed-use community that includes a zero-waste restaurant, farm-to-tap organic brewery and coffee roaster, market, café, and apothecary, alongside wellness classes and 250 residential homes. "At the heart of it, the goal is to build community through agriculture, creating a space where people can reconnect with the land, their food, and each other," founder Brian Grover tells VML Intelligence. "What makes Fox Point Farms unique is our circular micro-economy, where artisans, farmers, residents, and visitors are all part of a self-sustaining ecosystem."

Anna DeSimone, author of *Welcome to the Agrihood*, believes community is the key appeal for people. "Although the agrihood lifestyle offers close access to fresh fruit and vegetables, a primary driver is the quality of life," she tells VML Intelligence. "Agrihoods are often referred to as a 'lifestyle community,' and nearly all communities have a clubhouse or other type of gathering space."

And they're not just a rural North American phenomenon. The Michigan Urban Farming Initiative in Detroit claims to be the first urban agrihood and was set up "as a platform to promote education, sustainability, and community" while enhancing food security. In Australia, Arkadian Developments plans to create a new agricultural community in Far North Queensland, while Yangcheng Lake Island Senior Housing, near Suzhou, China, is an active elderly community built around a farm.

Why it's interesting

The rising popularity of agrihood living is indicative of a growing disillusionment with modern lifestyles and food systems. Brands in all categories can take inspiration from the authenticity, community, sustainability, purpose, and lifestyle offered by life on a community farm.

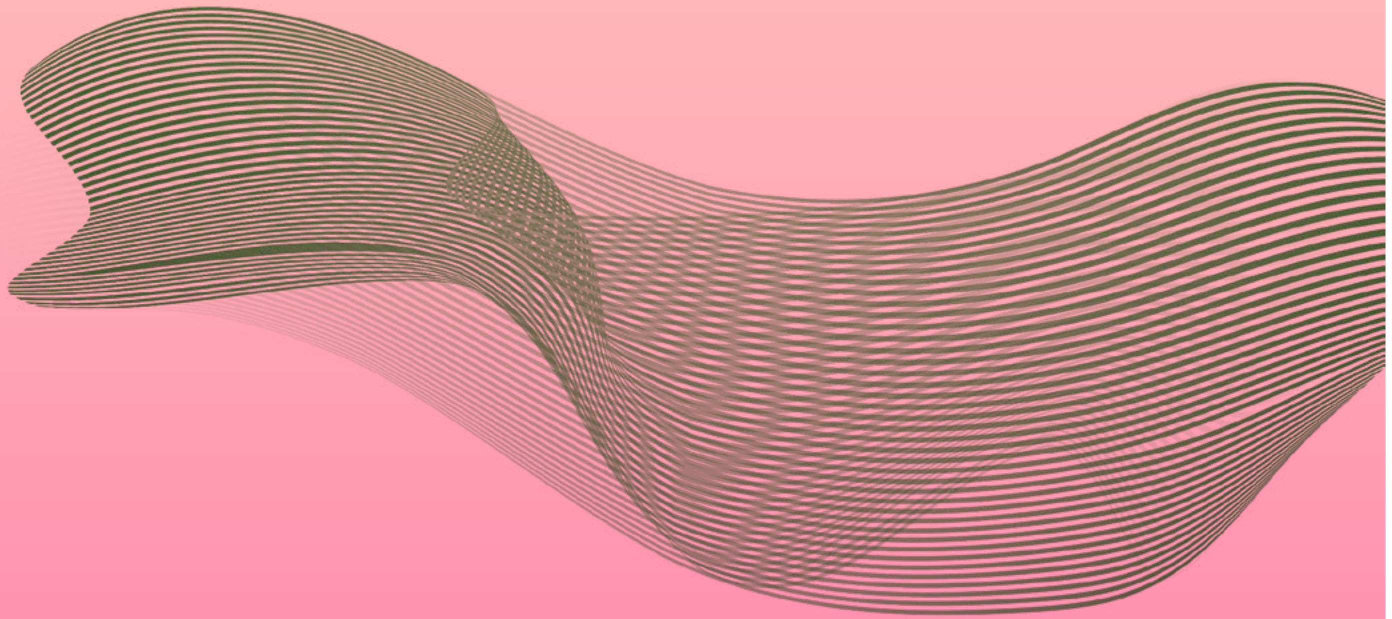
FOX POINT FARMS
Encinitas
California
ARUGULA
NET WEIGHT 8 OZ
FOXPOINTFARMS.COM
IN YOUR VEGGIE BOX
from FOX POINT FARMS
CUCUMBER
PURPLE DAIKON RADISH and/or WATERMELON RADISH
SIGNATURE SALAD MIX
8 BALL SQUASH or PATTY PAN SQUASH
GREEN KOHLRABI
RED RUSSIAN KALE BUNDLE
ARUGULA
GREEN and/or YELLOW ZUCCHINI

Veggie box, Fox Point Farms, California. Courtesy Maria Russo

48

ANTI-ESTABLISHMENT CAFÉS

A new wave of innovative coffee shops is reinventing the format.



15
延庆路
MANUAL
ESPRESSO BAR

Manual Espresso Bar, Shanghai, by Office Coastline

Across the globe, a new generation of coffee shops is redefining how we engage with one of the world's most beloved beverages. In China, guerilla coffee shops such as Judo Espresso Dojo, designed by Nhoow Architects, and bicycle garage Manual Espresso Bar, designed by Office Coastline, have sustainably repurposed existing locations to create an unfinished, construction-site aesthetic that bucks the trend for polished, high-concept café brands. In the United States, the café format has adopted a cozier feel with influencers such as @a.goodtable and hobby baristas opening up their apartments as free cafés for their friends, with themed playlists and custom-branded packaging.

These cafés address the issue of the rising price of high-quality coffee, which Kyoto's minimalist, self-service coffee shop 2050 Coffee—named for the year when global coffee scarcity will become a reality—also hopes to address. "Alternative ways to continue enjoying coffee without raising prices might be to install custom, self-service coffee taps, like in 2050 Coffee, that don't compromise on quality," Tatsuya Nishinaga, founder of Teki Design, which created 2050 Coffee, explains to VML Intelligence. "Our smaller counters foster conversation between the barista and customer about the future of coffee. We want to be part of the solution of how to continue enjoying coffee in the future."

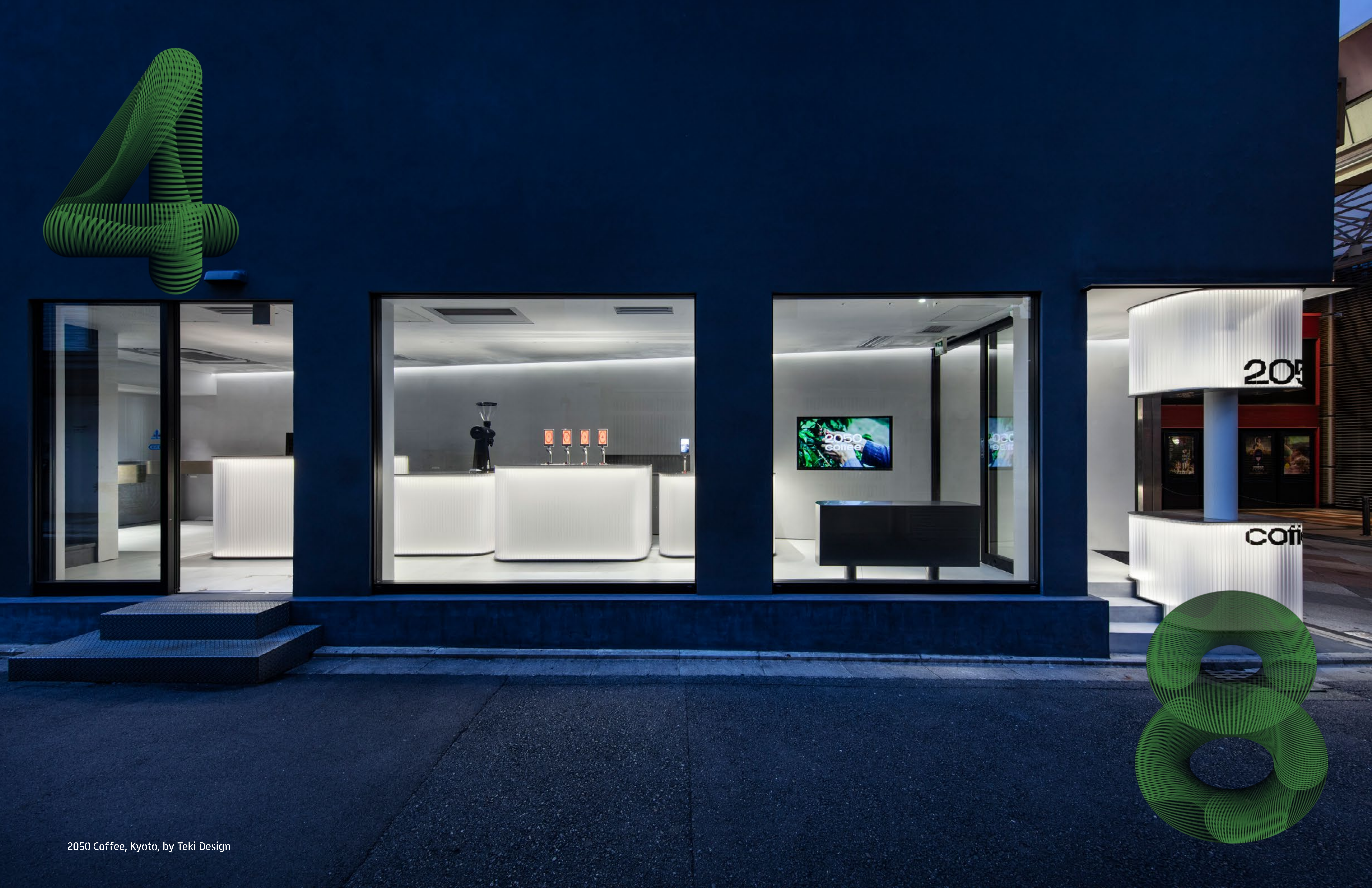
Although 2050 Coffee embraces dialogue, Mamonaku Kohi in the Philippines has sought to remove social interaction entirely by serving coffee through a rugged hole in a concrete wall. "We have baristas and customers who are introverts and don't want to be forced to talk when getting really good coffee," director Anton Diaz tells VML Intelligence. "The hole-in-the-wall format means they aren't forced to interact face to face. We initially thought it was a niche market, but it isn't." Diaz cites other popular hole-in-the wall-type establishments including Anakuma Café in Tokyo and Jamboo in Malaysia.

まもなく
コーヒー
TOKYO SPECIALTY COLD COFFEE
MAMONAKU KOHI

Mamonaku Kohi, Quezon City, Philippines

Why it's interesting

With coffee prices rising due to the costs of retail space, labor, and coffee beans, consumers are actively seeking out new, affordable coffee formats that also cater to individual social preferences without compromising on taste.


4
8
2050
coffee
205
coff

2050 Coffee, Kyoto, by Teki Design

49

INSTANT HEALTH COCKTAILS

Cocktails are being reinvented through a wellness lens for the health-focused and sober-curious.

CEYBON AF'CHILL
Alcohol Free
Mushroom-Infused Aperitif
REISHI • JUNIPER • CUCUMBER • MINT

Chill AF, Ceybon

VIA
sparkling aperitif
a mood-boost in every sip
non-alcoholic 250 ml | 8.5 fl. oz.

Sparkling Aperitif, Via

Prompted by consumer yearning for more wellness-oriented options, a new generation of cocktails is emerging, promising the uplift and conviviality of alcohol without the negative impacts on body and mind. The "Sober Curious Generations" report by NCSolutions found that 61% of gen Z Americans planned to drink less in 2024, while Mintel reported that 71% of gen Z and 73% of millennials are interested in trying a sober-curious lifestyle as it "aligns with priorities like health and wellness."

Holistic health practitioner Dr Giulietta Octavio is a leading proponent in this space. Her Ceybon AF range of adaptogenic, nootropic, alcohol-free, mushroom-infused aperitifs claim to boost drinkers' moods while mimicking the feeling of drinking alcohol. Ceybon's Chill AF, Happy AF, and Bright AF products are said to evoke a sense of calmness, euphoria, and energy, respectively. Octavio told *Food Dive* that Ceybon uses a range of botanicals to mirror the viscosity and bitterness of drinking alcohol, while the drinks "ultimately shift someone's mood."

Australian brand Via's sparkling alcohol-free cocktails use its patented Viagenics adaptogens to "balance your cortisol levels, banish brain fog, and improve focus and mental capacity." The range uses the language of alcohol, offering margarita, brut, and aperitif options, which cofounder and CEO Sarah Morley says was a very intentional move to make it "feel like a natural, seamless choice rather than a deviation from the norm."

"Today's consumers are more intentional about their wellness and lifestyle choices," she tells VML Intelligence. "Via drinks allow people to savor the ritual of a celebratory drink, but with a twist that actually promotes wellbeing. It's about making a choice that feels luxurious, flavorful, and fun—while still supporting self-care and connection."

Why it's interesting

"Consumers are looking for more than just a replacement to alcohol; they want something that supports their lifestyle and values," says Morley. Food and beverage brands must reinvent the tactile and mood-boosting rituals of traditional consumption habits for a new era of wellness-focused consumers.

50

THREE HOT INGREDIENTS

SHIITAKE MUSHROOM OIL
ALGAE COOKING CLUB
GOCHUGARU CHILI OIL
ALGAE COOKING CLUB

Algae cooking oil

Cooking oil made from microscopic algae is garnering interest from renowned chefs for its health and sustainability benefits. Neutral in flavor and high in healthy Omega-9 monounsaturated fats, it offers a carbon footprint that is said to be roughly half of avocado oil and a tenth of the land and water usage of vegetable oil. San Francisco Bay chefs at Saison, Aphotic, and Foreign Cinema have switched to using it, citing its lower carbon footprint, high smoke point (535°F), and neutral flavor as key draws.

Los Angeles-based Algae Cooking Club is a supplier to top restaurants and stocked by luxury LA grocer Erewhon. The company has joined forces with chef Daniel Humm, from Michelin-starred New York restaurant Eleven Madison Park, to add two new infusions to its algae oil range: the Gochugaru Chili Oil, which has nine spices including cinnamon, cardamom, and star anise, and the Shiitake Mushroom Oil, which has six spices including Urfa chili, red miso, and black garlic.

“We don’t give people credit for how open they are to trying new culinary ingredients,” Kas Saidi, cofounder of the Algae Cooking Club, tells VML

Algae-infused cooking oil, Algae Cooking Club

Intelligence, adding that he believes food curiosity is at an all-time high. "Layer on that there's never been a greater desire for a healthier, clean, versatile cooking oil… People are growing aware that avocado and olive oils are often blended with seed oil, or just simply don't work for all cuisines. Algae oil hits all the cues: better in the kitchen, for health and, yes, for the planet."

Duckweed

It may not sound immediately appetizing but duckweed—aquatic plants that grow on the surface of freshwater—are tipped to gain traction, thanks to their sustainable qualities and high protein content.

Plantible Foods, a US duckweed protein ingredients developer, has already launched Rubi Whisk—a plant-based egg replacer for baked goods, gluten-free products, pasta, and other applications. In baking, the brand says the plant-based egg replacer will "outperform the versatility of conventional eggs, providing excellent binding, emulsification, and solubility. It also provides high-foaming capacity and moisture retention, is neutral in color and taste, and is allergens-free."

Greenhouse, Plantible Foods

According to the developer, as well as not using land and pesticides, duckweed requires 10 times less water per kilogram of protein than soy, and doubles in mass every 48 to 72 hours. Plantible's first partner, New York City's vegan bakery Sweet Maresa's, is debuting Rubi Whisk in its macarons. "Not only do their protein ingredients work better than any other plant-based ingredient on the market, but they essentially function just like egg whites in my macarons," Maresa Volante, founder of Sweet Maresa's, tells *Vegconomist*.

Makhana

Alias-hopping makhana is the seed of the water-lily plant, also known as the fox nut, gorgon seed, or lotus seed. Akin to a kind of underwater popcorn, as it's "popped" in a similar way to corn kernels, this nutrient-dense food is poised for growth in 2025 and is building a reputation as a superfood.

According to the BBC, improvements in makhana cultivation and harvesting are accelerating production of the crop in its native India, where is prized for its high vitamin B, protein, and fiber content. Grand View Research predicts growth at almost 12% CAGR in the global market for the seeds, which it currently values at $44 billion.

Already popular in Asia, makhana is expected to spread to more countries as a healthy potato-chip alternative. In Singapore, startup Strictly Nuts launched 10g packs of fox nuts in four flavors in summer 2024, and is reportedly eyeing markets including the United States, Canada, the Middle East, and South Korea for expansion.

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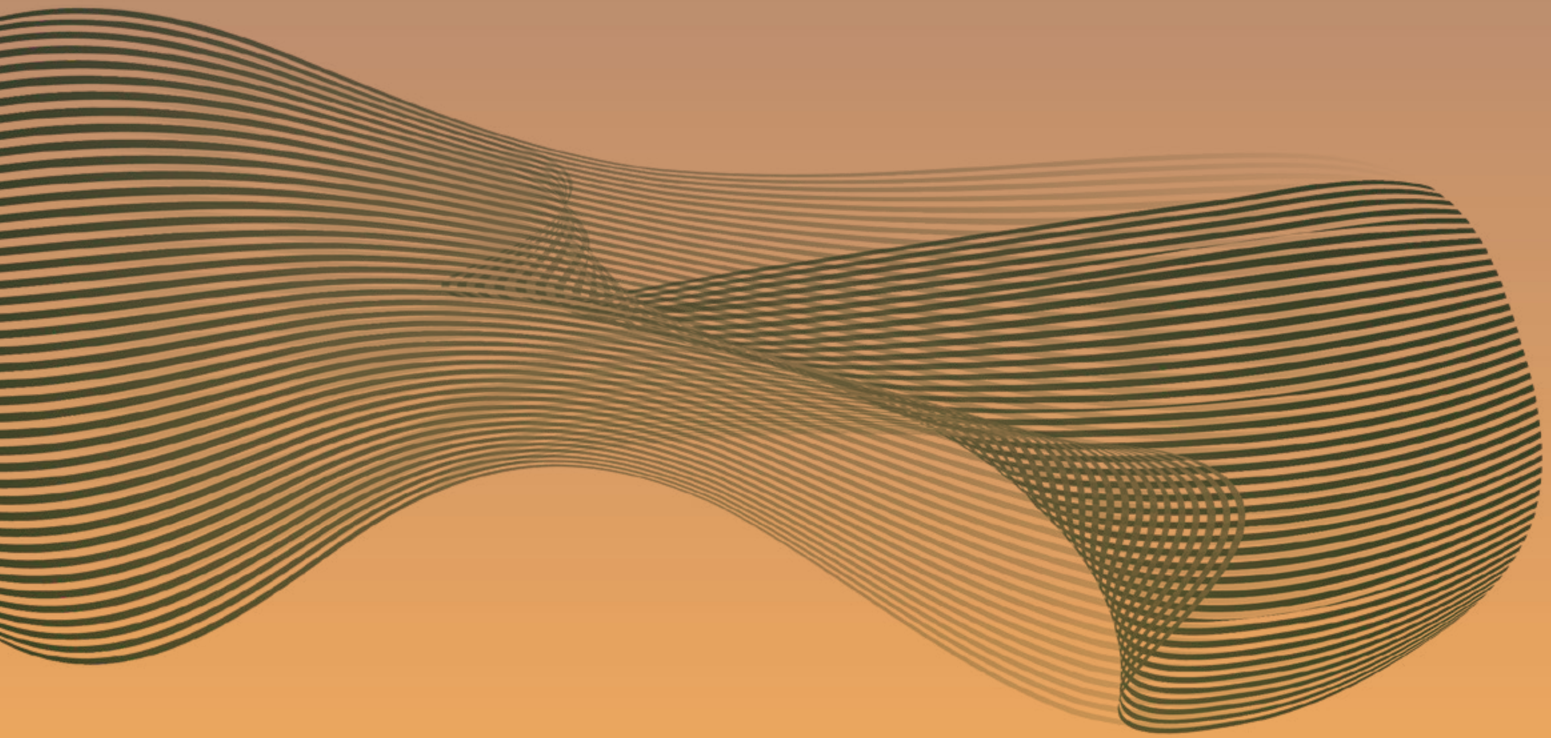
BEAUTY

60

51

SKINTERTAINMENT

Beauty brands evolve into entertainment companies.



Get Ready with Music, Elf Cosmetics

GRWM
AN elf made PRODUCTION

Expanding beyond just selling products, beauty brands are now aiming to entertain customers through immersive experiences, engaging content, playful designs, and unexpected collaborations.

Elf Cosmetics now views itself as “more of an entertainment company” than a traditional beauty brand, according to Ancella Thomas-Evans, international marketing director. In October 2024, Elf released *Get Ready with Music*, a 13-track album featuring global artists, celebrating self-expression by blending beauty and music. In February 2024, the brand also launched one of the first beauty shopping apps for the Apple Vision Pro. Chief digital officer Ekta Chopra explained, “It’s critical to meet our community—and entertain them—wherever they are.” The Your Best Elf app offers users playful environments where they can explore 3D Elf products, along with activities such as guided meditations, stretching exercises, and an interactive paint-by-numbers game.

Similarly, NYX Professional Makeup is positioning itself as an entertainment brand through partnerships such as its collaboration with celebrity chef Gordon Ramsay and his daughter Holly. Together, they created a cake recipe to support the launch of the brand's Buttermelt Blush, using ingredients from the product to tie beauty and food in a unique way. "What drew me to this partnership was the chance to entertain global audiences in a fun and unexpected way," said Ramsay.

Korean beauty brand 3CE has partnered with Chinese designer brand SMFK to launch a fresh 2025 New Year capsule collection. This collaboration seamlessly blends 3CE's on-trend color spectrum with SMFK's edgy streetwear style, resulting in a fun array of co-branded makeup packaging alongside practical accessories including bags and earmuffs. "We aim to be a more entertaining part of our consumers' daily lives," Cory Han, 3CE brand communication senior manager, tells VML Intelligence. By intertwining beauty and fashion, 3CE is transforming the shopping experience into an engaging journey that sparks joy and creativity for its customers.

Why it's interesting

By blending beauty with entertainment, brands are deepening customer engagement, creating memorable experiences that go beyond products and setting a new standard for consumer-brand interaction.

NYX Professional Makeup partnership with Gordon and Holly Ramsay

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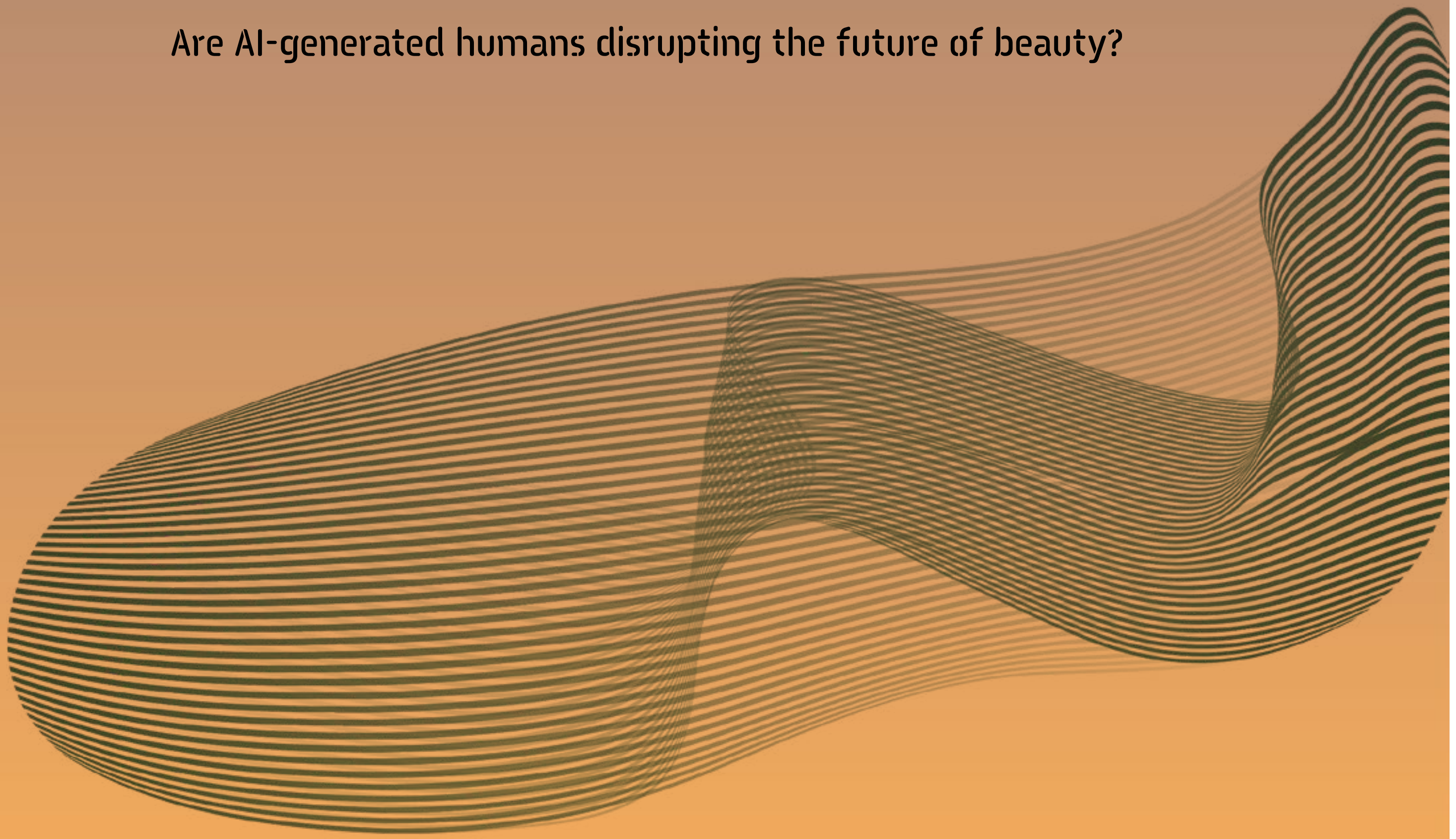
ALGORITHMIC BEAUTY

Are AI-generated humans disrupting the future of beauty?



Virtual influencer Kenza Layli from Morocco, winner of the Miss AI competition

After years of women and leading brands upending traditional notions of beauty and widening the lens, artificial intelligence (AI) creators are experimenting with the possibilities of how the next iteration of beauty could look.

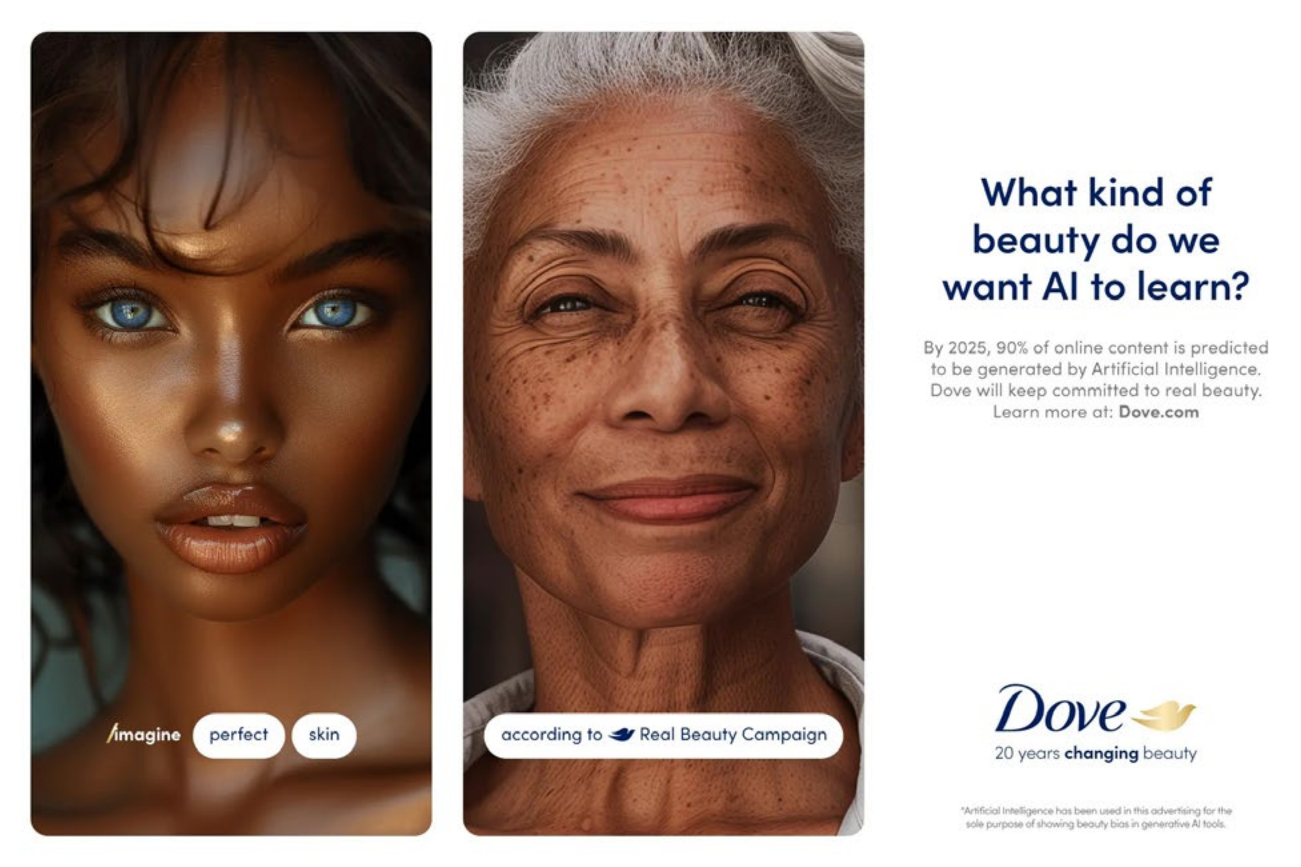
In summer 2024, Virtual Beauty, an exhibition at the House of Electronic Arts in Basel, Switzerland, explored how technology intertwines with our identity and reshapes the definition of beauty. Artists featured included Daniel Sannwald, known for experimenting with AI to distort portraits.

Celebrities and models have been taking advantage of AI digital twins for commercial purposes, leading to the rise of AI agencies (or AIgencies) such as The Clueless and The Diigitals. While most virtual models resemble humans, The Diigitals' portfolio includes Galaxia, an otherworldly character that again pushes the boundaries of beauty by going beyond the human.

Taking a more traditional lens on beauty is the first Miss AI competition, launched in spring 2024. Judging was shaped by three criteria, the first being beauty, with contestants assessed on “the classic aspects of pageantry including their beauty, poise, and their unique answers to a series of questions,” explains the Miss AI site. The second is tech, in particular the innovative use of AI; the third is social clout. Moroccan AI influencer Kenza Layli was crowned the winner in July, followed by Lalina from France and Olivia C from Portugal.

There is debate, however, when it comes to generative AI's perception of beauty. “The Real State of Beauty: A Global Report” by Dove found that as much as 90% of online content could be AI-generated by 2025 and that

Virtual influencer Aiyla Lou from Brazil, participant in the Miss AI competition


imagine perfect skin
according to Real Beauty Campaign
What kind of beauty do we want AI to learn?
Dove
20 years **changing** beauty

By 2025, 90% of online content is predicted to be generated by Artificial Intelligence. Dove will keep committed to real beauty. Learn more at: **Dove.com**

*Artificial Intelligence has been used in this advertising for the sole purpose of showing beauty bias in generative AI tools.

The Dove Code, Dove

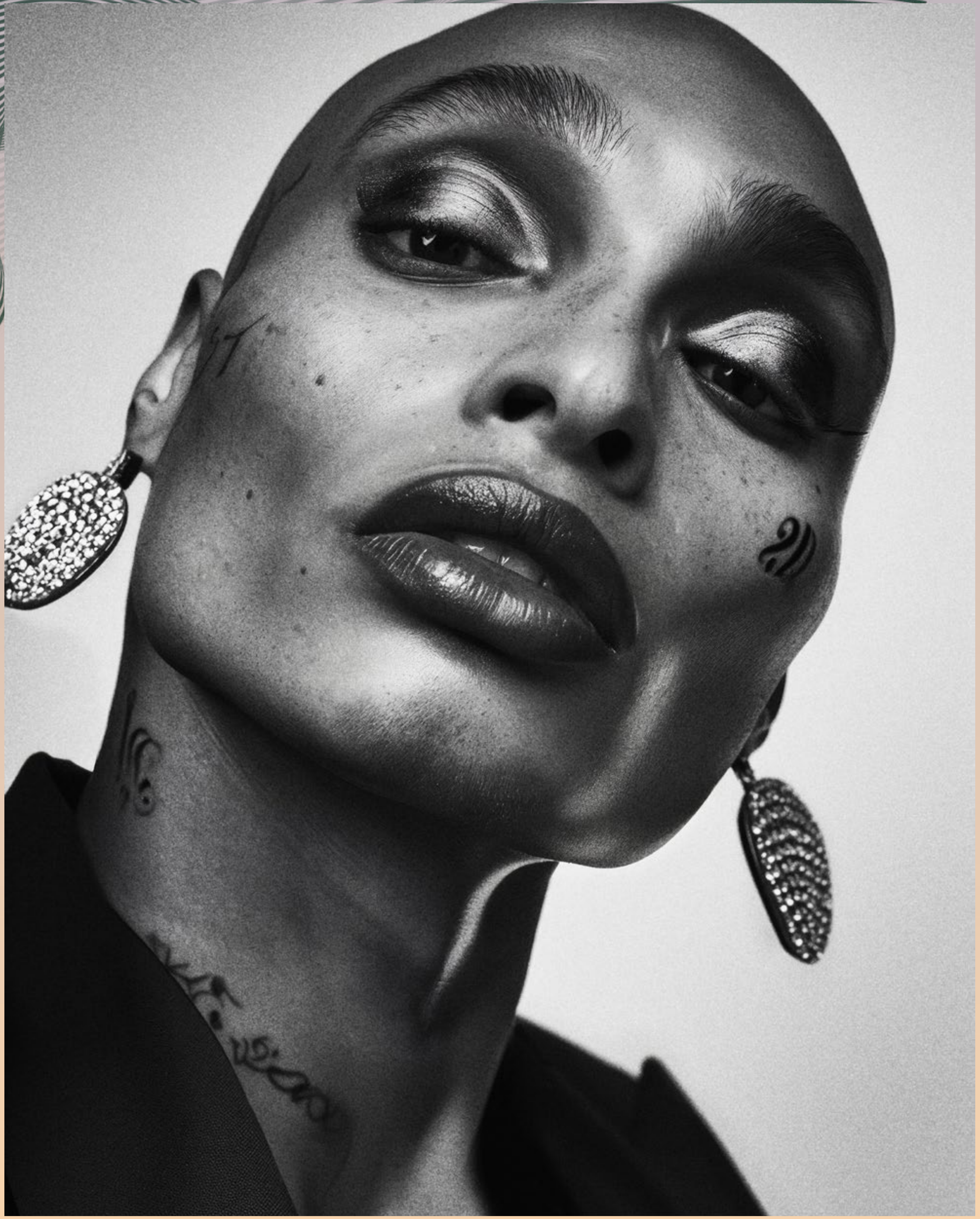
Absolut Vodka collaboration with creative studio Copy Lab

one in three women feel pressure to alter their appearance because of what they see online, even when they are aware it is fake or AI-generated. In April 2024, the company was the first to publicly announce that it will never use AI to represent real bodies in its advertising. This chimes with VML data that finds 74% of people globally say they are concerned about the impact of AI-generated imagery on young people.

In May 2024, Absolut Vodka collaborated with creative studio Copy Lab to use AI to tackle biases and stereotyping in beauty and fashion content. “Research shows that 90% of AI-generated content is in danger of under-representation,” says Carl-Axel Wahlström, founder of Copy Lab. “By leveraging technology responsibly, we can redefine beauty standards and promote an inclusive representation of diversity within the fashion landscape.”

Why it’s interesting

Seventy percent of millennials (and 65% of the global population) believe that AI tools will allow us to be more creative and progressive in imagining the future of beauty. Brands and AI-creators have the opportunity to set the next generation of digital beauty ideals—making the landscape more inclusive and diverse, and perhaps taking further leaps to go beyond the human form. This is where the next iteration of digital beauty could excel.



VML

Absolut Vodka collaboration with creative studio Copy Lab

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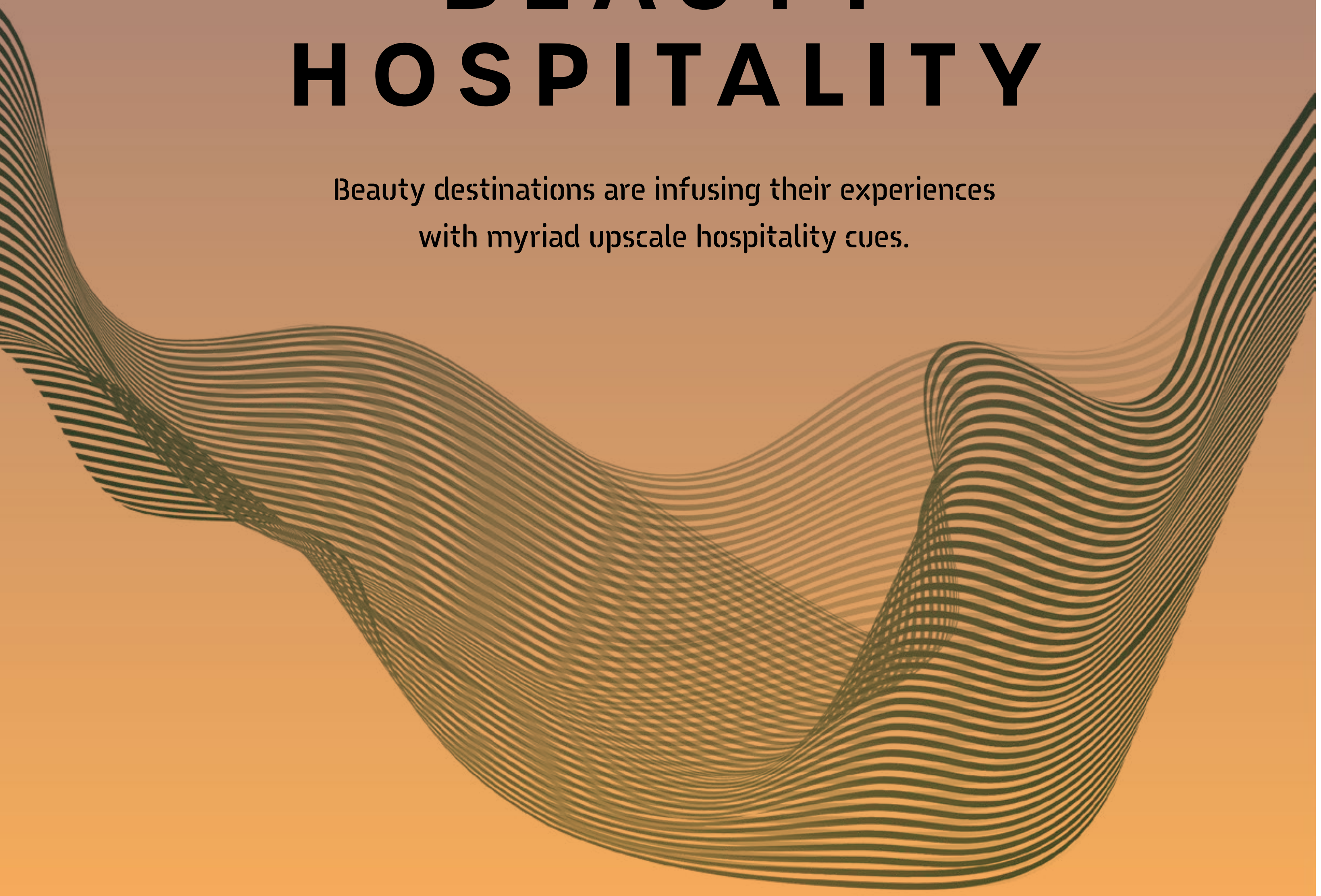
BEAUTY HOSPITALITY

Beauty destinations are infusing their experiences with myriad upscale hospitality cues.



A new clutch of beauty service offerings is turning a trip to the salon into something far from merely functional. Among them is Kure Bazaar's new maison in Paris. The brand, known for its clean, vegan nail polish formulas, opened La Maison Kure Bazaar, its first standalone destination, in September 2024. The 2,580-square-foot, two-story space on the city's rue Saint-Honoré takes hospitality to new heights. It offers "a living space in the heart of Paris," says founder Christian David. "I wanted to create a house, a Maison Kure Bazaar that embodies more than a nail salon; the concept here is everything revolves around hospitality," he tells VML Intelligence.

That beauty brands are creating these hospitality-infused experiences chimes with the trend among luxury fashion houses for opening expansive, all-encompassing stores. As we noted in our luxury retail temples trend in 2024's "Future 100" report, in 2023 houses including Chanel, Tiffany & Co., Gucci, Burberry, and Dior opened spaces that bolstered their "world-building." Now beauty brands are following suit.

Across the Kure Bazaar Maison's vast interior, guests can meet to have manicures and treatments while enjoying cakes infused with essential oils, made in collaboration with chef Alain Ducasse's team; pastries by artisan baker Gérald Auvrez; and, to drink, infusion cocktails made with medicinal plants and coffee from L'Arbre à Café, an artisan roaster. In terms of the beauty experience, there are treatments for hands, feet, and nails, personalized to each client, integrating medicinal plants and flowers. The house will begin to offer what David describes as "a beauty treatment service that combines body and mind," with a program of meditative manicures, philosophical manicures, and literary manicures, which will involve philosophical discussions and literary readings.

KURE BAZAAR
165 RUE SAINT-HONORÉ
PARIS
Kure
BAZAAR
PARIS

MY GOAL IS A NEW ART OF HOSPITALITY: DO GOOD WITH GOOD.

Christian David, founder, La Maison Kure Bazaar

"My goal is a new art of hospitality: do good with good," says David. "The maison is intended to be welcoming, like an address where it is good to meet up with friends. Everything has been designed like a house, each piece of furniture chosen with this objective of conviviality but also sticking to the DNA of the brand, one of innovation and wellness."

Majesty's Pleasure, a "social beauty club" that was founded in Toronto and has now launched in New York's Flatiron District, offers a full menu of beautifying mocktails and lattes alongside its manicures and treatments. Guests can also sip cocktails at the bar, while a private room is available for bespoke events.

Why it's interesting

Weaving hospitality into beauty treatments amplifies time for respite and connection, turning a trip to a beauty maison into a destination that fosters wellbeing on myriad and deeper levels.

Above left: La Maison Kure Bazaar, Paris. Courtesy Kure Bazaar
Left: Barista at La Maison Kure Bazaar, Paris. Courtesy Kure Bazaar

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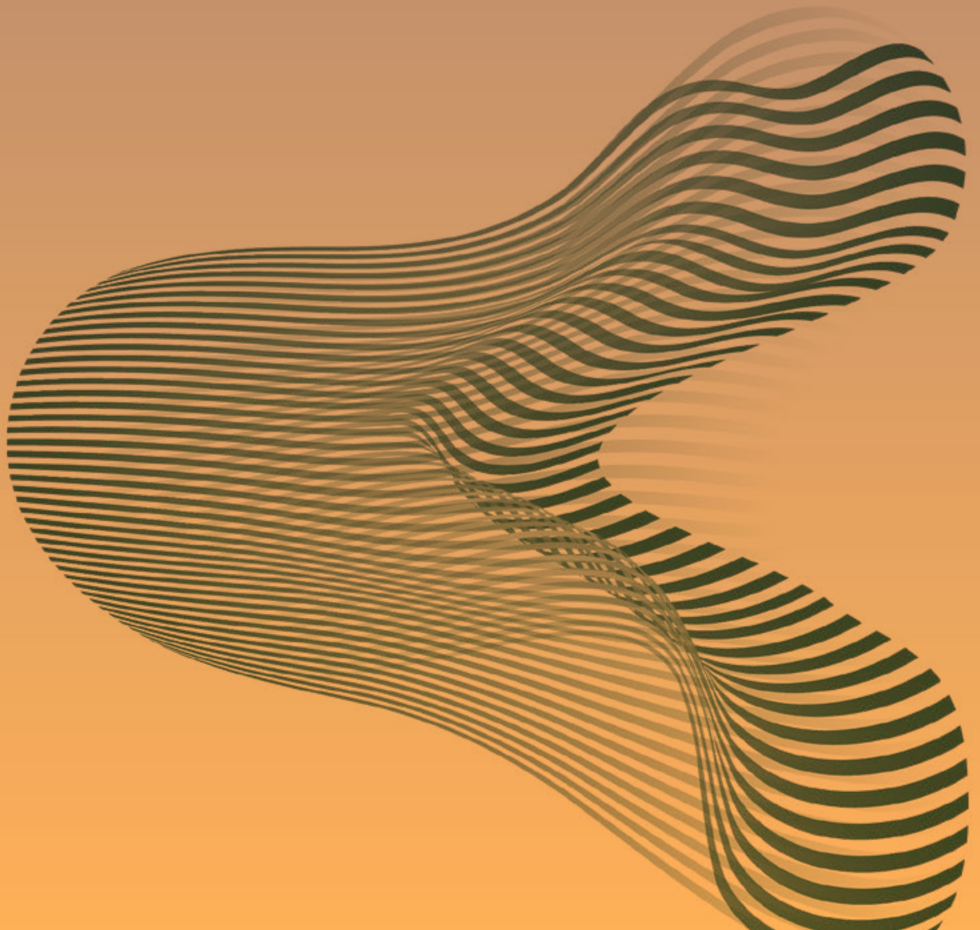
OTHERWORLDLY CHROMES

Makeup artists are getting experimental with oversized, inverted, and bold metallic aesthetics.



On recent runways, makeup artists took to their shimmering chrome palettes and adorned models with looks that were equal parts rebellious, fantastical, and futuristic.

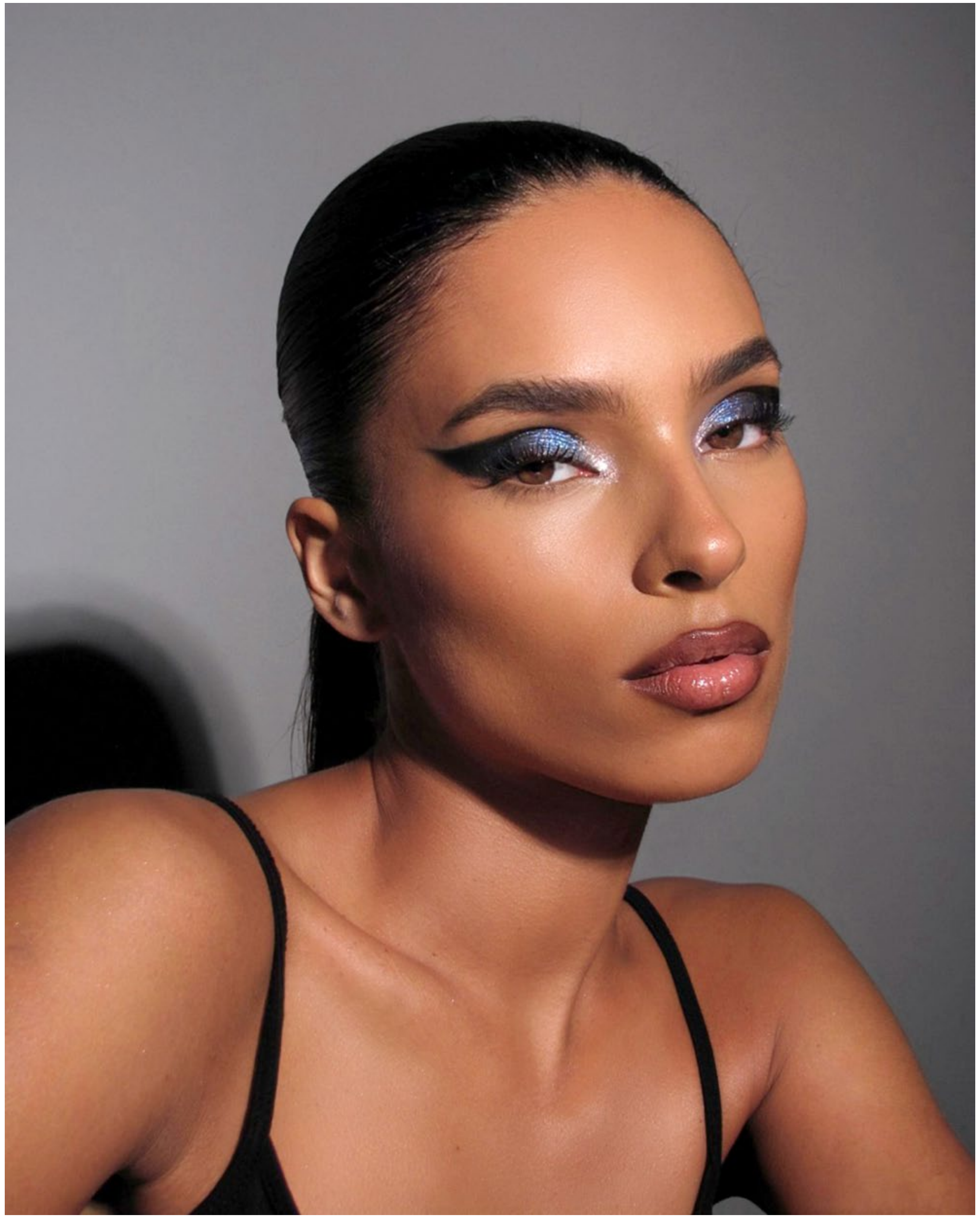
During London Fashion Week in September 2024, London-based Asian American designer Chet Lo had his models sport inverted silver acrylic nails as they walked in his spring/summer 2025 collection. The nails appear strange at first sight, as though the gel had been applied back to front, but reversing pointed nails also has practical benefits. The designer often applies a modern sci-fi aesthetic to illustrate his collections. For fall/winter 2024, makeup artist Isamaya Ffrench applied chrome tears to nails that emulated molten metal. This look was worn with outfits that referenced a knight’s armor, including silver handknitted headdresses and chainmail-like garments.

Japanese fashion designer Junya Watanabe transported spectators at Paris Fashion Week 2024 to another galaxy, as cyborg-esque models took to the runway with robotic makeup and ultra-dilated pupils that looked extraterrestrial. This look, alongside Watanabe's spring/summer 2025 collection filled with bold silver and monochromatic pieces, made for an otherworldly marvel.

For Loewe's spring/summer 2025 women's runway show, makeup artist Pat McGrath gave models chunky golden eyebrows and bold silver winged eyes. Using swatches from her limited-edition Luminous Legends: Mega Eye Shadow Palette, launched in September 2024, McGrath channeled models with a modern celestial chromatic look, using shades aptly named Golden Muse and Lunar Luxury. In an interview with *Vogue*, McGrath explained that the creative direction from Jonathan Anderson was "modern couture."

Why it's interesting

Lustrous and glistening metallic looks that channel the otherworldly use beauty to further create a dialogue between technology, humans, and the future.



Pat McGrath Labs Luminous Legends: Mega Eye Shadow Palette. Courtesy of Pat McGrath

55

SUNCARE'S SKINIFICATION

Rife with innovation, suncare products are evolving from summer holiday basics to multitasking daily skincare non-negotiables.

Heliocare

Sun protection is fast becoming a part of daily skincare routines and with 2.4 million #sunscreen tags on TikTok alone, as of January 2025, consumers are lapping up innovations in this arena. Multipurpose products that incorporate skincare benefits from brightening to bronzing to pore-reducing are in high demand.

The demand for moisturizing and antioxidant properties means that brands are having to invest in technological advances. With the global suncare product market projected to grow from $14.9 billion in 2024 to $22.28 billion by 2032, according to Fortune Business Insight, it is a space

Airy fit Sun Stick
KAHI

Airy Fit Sun Stick by Kahi

proving worthy of investment. And with just 24% of people using a daily SPF according to VML data there is potential to grow the category.

Harry Styles's lifestyle brand Pleasing entered the market in July 2024 with Solar Dew Mineral Serum SPF 50+, which contains beauty wonder product niacinamide, claimed to reduce redness and dark spots. At Shiseido, the brand's patented SynchroShield repair technology offers wearers even stronger sun protection when the product comes into contact with water, a bonus for outdoor swimmers. Korean brand Kahi's Airy Fit Sun Stick, launched in 2024, not only protects from harmful UV but also claims to brighten skin and help improve wrinkles.

SynchroShield by Shiseido. Courtesy of Shiseido

In an unexpected turn that is a concern for dermatologists, some gen Z and gen alpha consumers are strategically applying suncream to isolated areas of the face to achieve a natural contouring effect or to eliminate acne, another illustration of how suncare is increasingly being regarded as synonymous with beauty.

Heavy, topical creams that are a chore to apply will give way to playful, scented, and lightweight gels and mists with products such as Sol de Janeiro's Rio Radiance SPF50 Body Spray sunscreen and Vacation's revival of its tinted Orange Gelée, following the viral success of its sell-out Classic Whip sunscreen mousse.

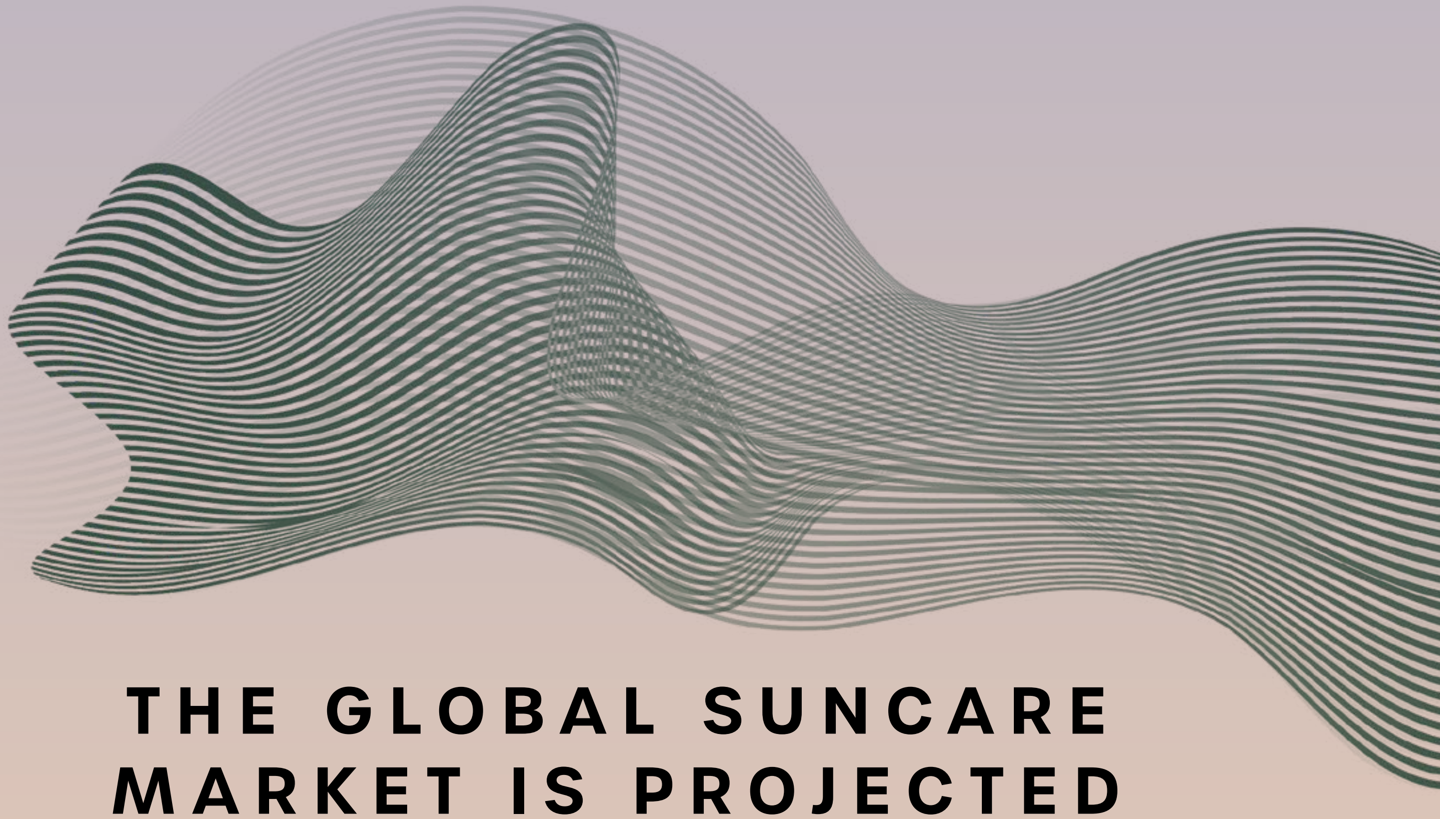
Facial mists must now work over makeup without leaving a white cast (especially troublesome for melanated skin). UK suncare startup Beame's Something You Mist face mist, shipping in 2025, even adds stressbusting, mood-lifting ingredients.

Expect to see more suncare innovation, from adhesive sunscreen patches from Korea, such as Amorepacific's IOPE, to the rise of ingestible suncare supplements. Cantabria Labs' sun protection leader Heliocare has 13 oral suncare products on the global market. "As new clinical discoveries emerge about substances that can improve skin conditions orally, we are committed to evaluating their efficacy in combination with our patented Fernblock® technology. Our goal is to continue to develop innovative products that will complement dermatologists' therapeutic arsenal," Cristina Redondo, Heliocare's brand manager, tells VML Intelligence.

Why it's interesting

As consumers reframe suncare as a year-round staple, they are looking for products that multitask, offering an array of skincare, beauty, and sun-protection benefits. At the same time, skincare brands can also embrace "sunification" by adding SPF to their products.

SunISDIN



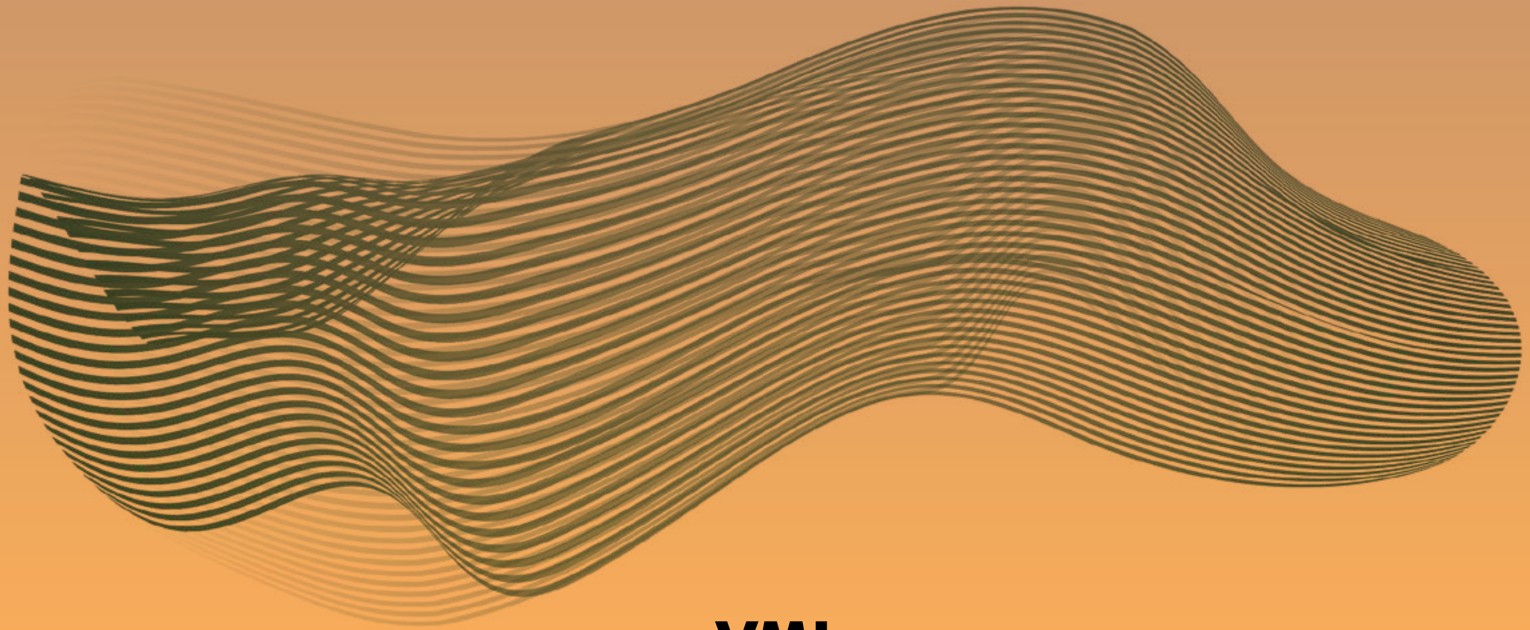
THE GLOBAL SUNCARE MARKET IS PROJECTED TO GROW TO MORE THAN $22 BILLION BY 2032.

Fortune Business Insight

56

GLOBAL MASCULINITY EVOLVES

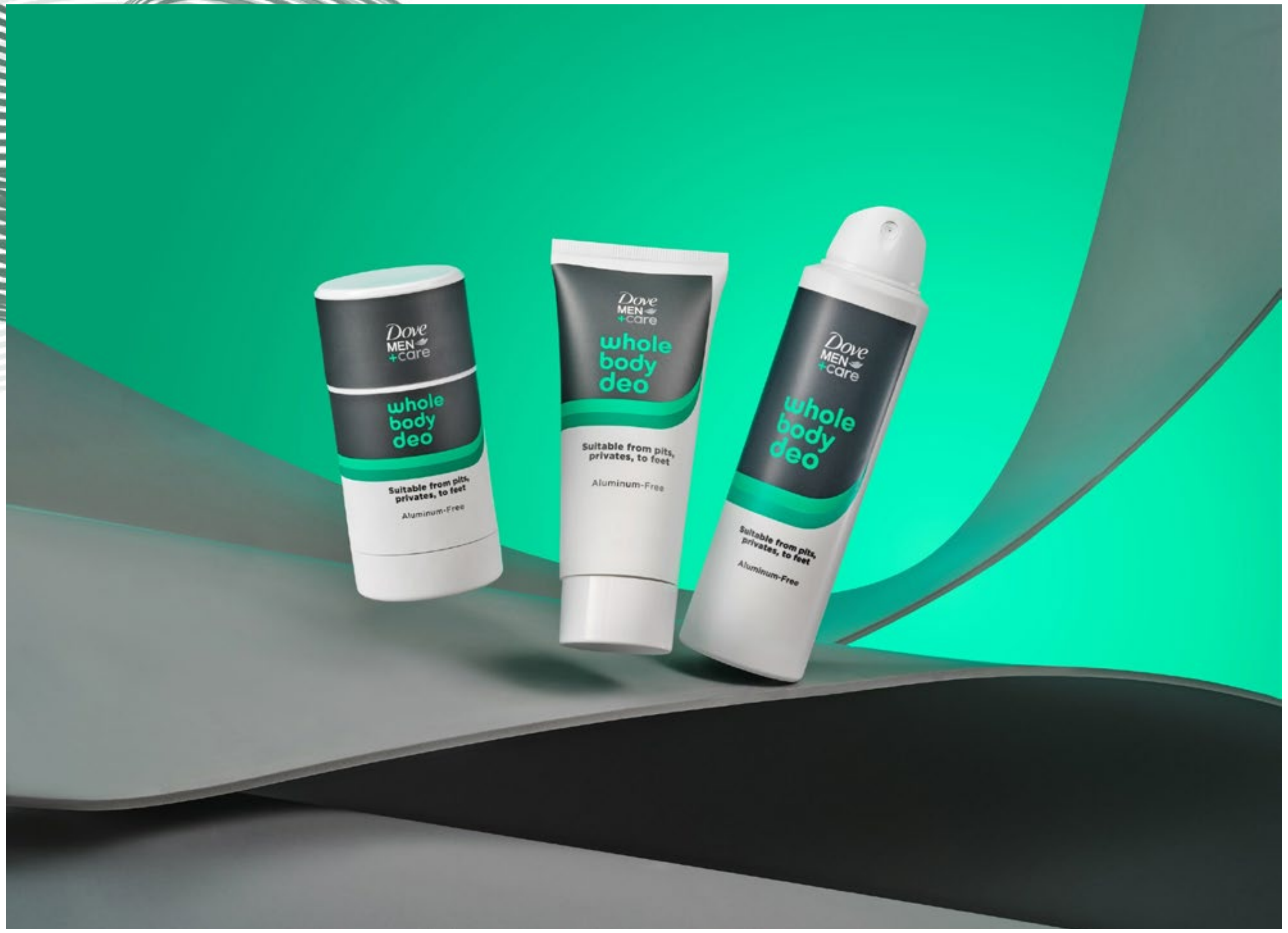
What is the future of modern masculinity?



More is expected of men than ever. They must be strong, sound of mind, and financially secure, yet emotionally available, and a rapidly evolving cultural landscape increasingly demands vulnerability too.

In Western markets, a cultural conversation is unfolding around the future of masculinity and how to redefine it for a changing world. Scott Galloway, a professor of marketing at NYU Stern School of Business, speaking at the SHE Media Co-Lab at SXSW, reasons that more and better male mentors for younger men would help. VML data finds that many back Galloway's view: 85% say society needs more positive role models for men and boys. In 2024, a growing cultural conversation celebrated the likes of Paul Mescal, Michael B Jordan, and Park Seo-joon, who broke through stereotypes by showing vulnerability, discussing mental wellbeing—and embracing flamboyance on the red carpet.

Brands are retooling communications in line with men's evolving sensibilities and, in Gillette's, case, highlighting their capacity for nurture. When the personal care company launched Gillette Labs, it recruited British singer Tom Grennan to re-record its iconic jingle "The Best a Man Can Get" with new lyrics and an accompanying video that showed men as fathers, carers, and nurturers. Similarly, Unilever's grooming brand Dove



Men+Care's latest launch signals that men are thinking more laterally about self-care (and specifically, body odor). The Whole Body Deo promises to go "beyond the armpit."

Globally, 78% agree that men have more diverse aesthetic looks to choose from than ever and this is particularly true in Asia, where acceptance of male beauty is more evolved, and demand for men's skincare and cosmetics is on the rise, thanks to the influence of celebrity and pop culture. This is reflected in brand representatives. In April 2024, luxury beauty brand La Mer appointed Taiwanese singer and actor Jay Chou as its first male ambassador.

Dove Men+ Care Whole Body Deo

According to Euromonitor, Korean men are big spenders on skincare and early adopters of male makeup. A survey by the Korean National Statistical Office found that nearly 80% of men engage in "appearance management" for self-confidence and satisfaction, while 70% do so to maintain social relationships.

In China, the men's skincare market is also growing rapidly. In November 2024, *Jing Daily* cited data that valued the men's cosmetics market at 20 billion RMB ($2.8 billion) in 2023, with men's skincare alone estimated at 16.5 billion RMB ($2.3 billion) in 2023, compared to 5.3 billion RMB ($744 million) in 2017. The report points to China's pool of single men with increased disposable income, who are increasingly prone to "appearance anxiety" as a driver for interest in male grooming and even beauty and makeup. The latter is much more accepted in Asian markets: in China, 76% of people say it is entirely acceptable for men to wear makeup, versus a global average of 62%, according to VML data.

While Asia is more accepting of male beauty, consumers globally agree that there's now much more pressure on men to look good than there used to be (72%). And with 65% of men saying they are comfortable buying beauty products advertised for a different gender so long as it matches their needs, there's an opportunity to uplevel provision too.

Why it's interesting

The conversation around masculinity is becoming more nuanced, and aesthetic options for men are more diverse. Brands have an opportunity to support men through this evolution as well as step up provision for every kind of masculinity.

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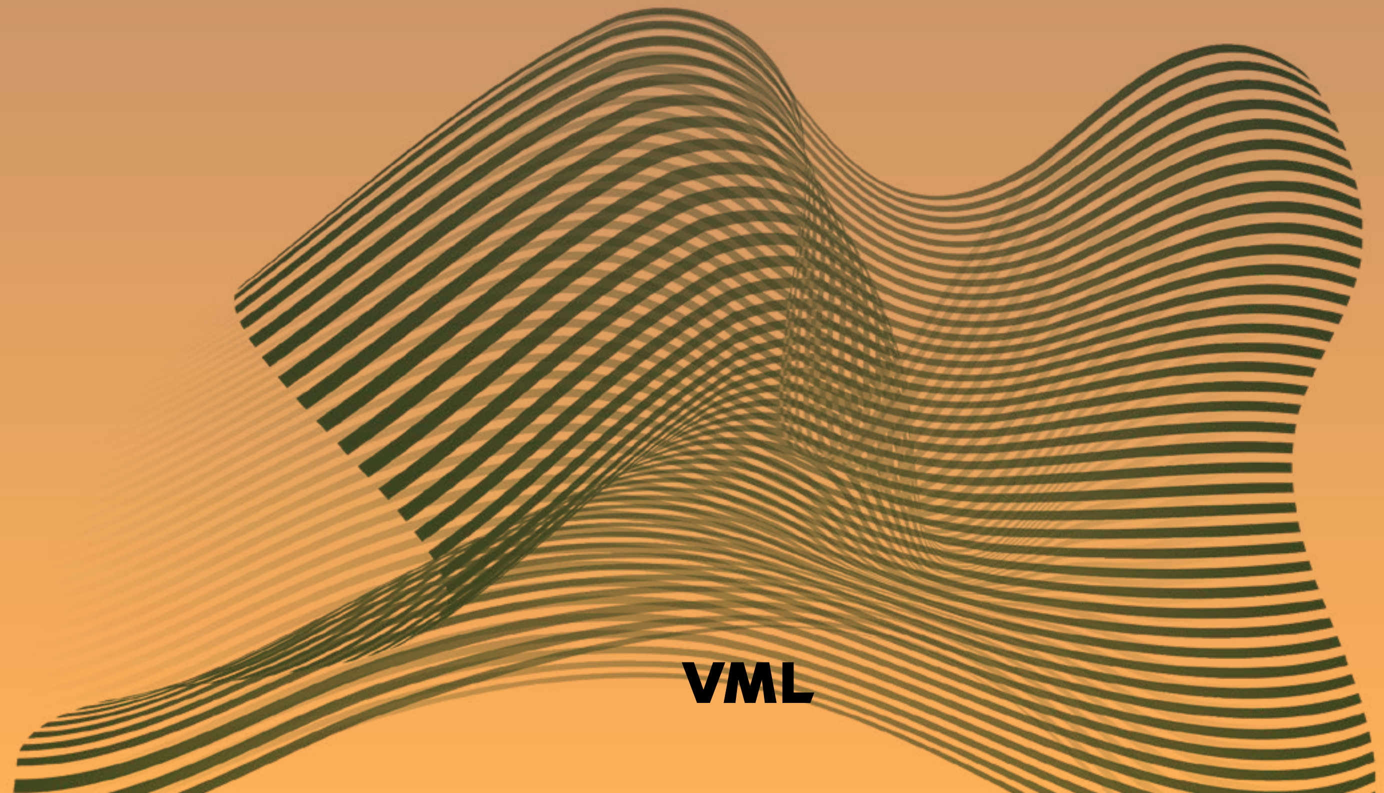
FINE FRAGRANCE REINVIGORATED

The luxury olfactory experience gets an update thanks to a young generation willing to splurge on smelling rich.



La Collection Rabanne

BALMAIN
PARIS
CARBONE

Carbone eau de parfum, Balmain Beauty

The allure of luxury scents is gaining traction among gen Zers and older alphas, turning their noses and wallets towards prestige fragrances that boost their sense of self. “It’s like a status thing right now—they all want it,” Abby Rivera, mother of 11-year-old Lincoln, an avid luxury cologne aficionado, told the *New York Times*. She compares boys’ attraction to fine fragrances to girls indulging in high-end skincare. This shift in consumer interest is reinvigorating the category, as brands seek to capture the potential of this new cohort.

Fashion label Rabanne is extending its reach in the world of luxury fragrances, launching eight new perfumes as part of La Collection Rabanne in September 2024. The collection draws inspiration from precious raw materials such as galvanizing woods and golden ambers. A release describes it as “uncompromisingly exquisite fragrances set to inspire and entice a new generation.”

British brand Molton Brown, known for its premium scented hand and body care collections, is pivoting its strategy by putting fragrances at the fore, hoping to boost dwindling sales. As part of this new direction, three popular perfumes are revived: Re-charge Black Pepper, Rose Dunes, and Coastal Cypress & Sea Fennel. Part of the brand’s Artists of Note collection, which debuted in August 2024, the fragrances cost $180 per bottle.

Fendi has also joined the fine fragrance club with the debut of seven different scents that draw inspiration from the Fendi family and their travels, and each bottle is priced at $330. As has Balmain with the introduction of Balmain Beauty, which debuted with eight gender-neutral luxury fragrances, Les Éternels de Balmain, launched in August 2024.

70% OF GEN Z BELIEVE THAT SCENT THEY USE REFLECTS THEIR IDENTITY AND 60% SAY THEY ARE WILLING TO SPEND A LOT OF MONEY ON IT.

Balmain says the collection is “inspired by the universal quest for self-realization and identity.” American beauty company Coty is also swooping in on premium fragrances with the global launch of Infiniment Coty Paris. The collection’s 14 different scents harmonize nostalgia, newness, and delight. A 75ml bottle is $290.

Self-expression is an important driver for young perfume fans—70% of gen Z believe that scent they use reflects their identity, and this cohort is the most likely to agree they are willing to spend a lot of money on it (60%). According to market research firm Circana, luxury fragrance sales in the United States were up 13% from January through August 2023 compared to the year before, with gen Z purchasing multiple fragrances per year. With a growing market, more brands are pouring efforts into launching fine fragrances.

BALMAIN
PARIS
VENT
ROUGE
IVOIRE
CARBONE
SEL D'AMBRE
INFINI

Why it’s interesting

As the appetite of younger consumers leans toward more refined, luxurious, and unique scents as a form of self-expression, brands are hoping to capture their attention early on by innovating and investing in signature scents gen Zers want to associate with.

Les Éternels de Balmain, Balmain Beauty

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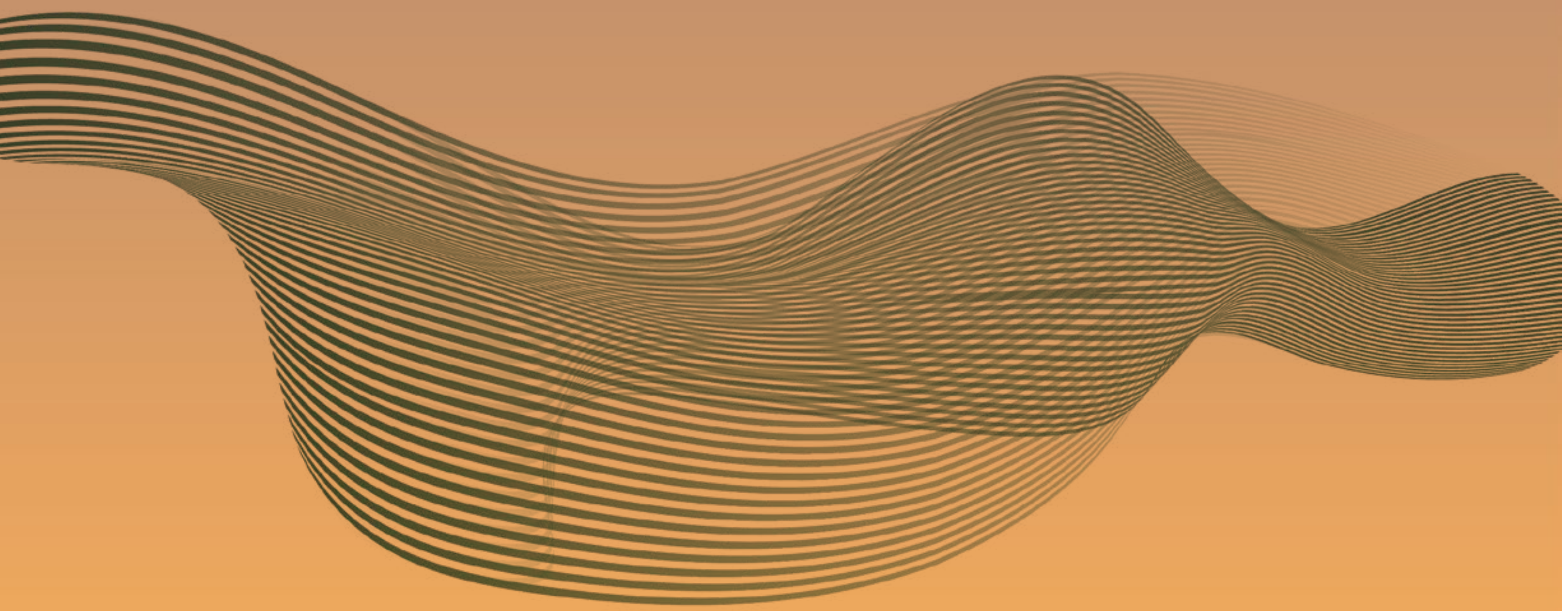
BACK-TO-SCHOOL BEAUTY

The new school season brings a major boost to the beauty category.



The back-to-school season is now a landmark shopping occasion: US youth culture commentator Casey Lewis calls it "gen Z's Super Bowl." There was a time when the term cued a rush for new stationery and clothes to "grow into," but today's teens and tweens treat the occasion with far greater reverence, investing in new tech, fashion, and, crucially, beauty.

In September 2024, *Dazed Digital* reported a rising trend that sees US teen girls hire professional makeup artists to prepare them for the first day back at college. Across TikTok, students have been sharing their routines, some of which involve getting up at 4am to begin the process. Beauty salons and spas now offer back-to-school facials, while (unconfirmed) reports have even surfaced on social media of kindergarteners with false nails. As observed in our "Future 100: 2024" report, generation alpha are way ahead of their forebears when it comes to skincare routines. As they grow older, that same sophistication is evident in their approach to beauty.

In summer 2023, there were 469,000 TikTok videos using the #backtoschool hashtag; by July 2024, this had increased to 2.5 million, and, as of January 2025, #backtoschool content on TikTok had reached 3.4 million posts, demonstrating its immense appeal. The platform has become a central hub for students, parents, and brands to share essential school-related content, from shopping hauls to beauty and style tips. Gen Z also turn to Pinterest for style, décor, and beauty inspiration as they prepare for the school year. Searches for terms such as "back-to-school nails" on Pinterest have surged, increasing by 50% year-over-year. Beauty brands such as L'Oréal have partnered with Pinterest to create dedicated back-to-school beauty pages, promoting products direct to this engaged audience.

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For the 2025 back-to-school season, beauty essentials—particularly those designed for quick, on-the-go use—are becoming must-have items. Popular products include mini deodorants, roller perfumes, and hydrating lip glosses. Other must-haves include haircare products that help prevent frizz and add shine, skincare items that maintain healthy skin and prevent breakouts, and makeup that is easy to apply and long-lasting. Nail care tools also play an important role.

Brands that are likely to succeed in this space offer affordable products without compromising on quality, emphasizing natural, clean ingredients that deliver effective results. K-beauty brands Beauty Creations and Glow Recipe are among the brands capitalizing on this trend.

Why it's interesting

Ultimately, brands that successfully connect with gen Z through platforms such as TikTok and Pinterest—and align with their values of personalization and social relevance—will capture a substantial share of the back-to-school market. As students seek products that express their individuality and enhance their daily routines, these platforms and brand partnerships will be crucial in shaping the back-to-school landscape for 2025 and beyond.

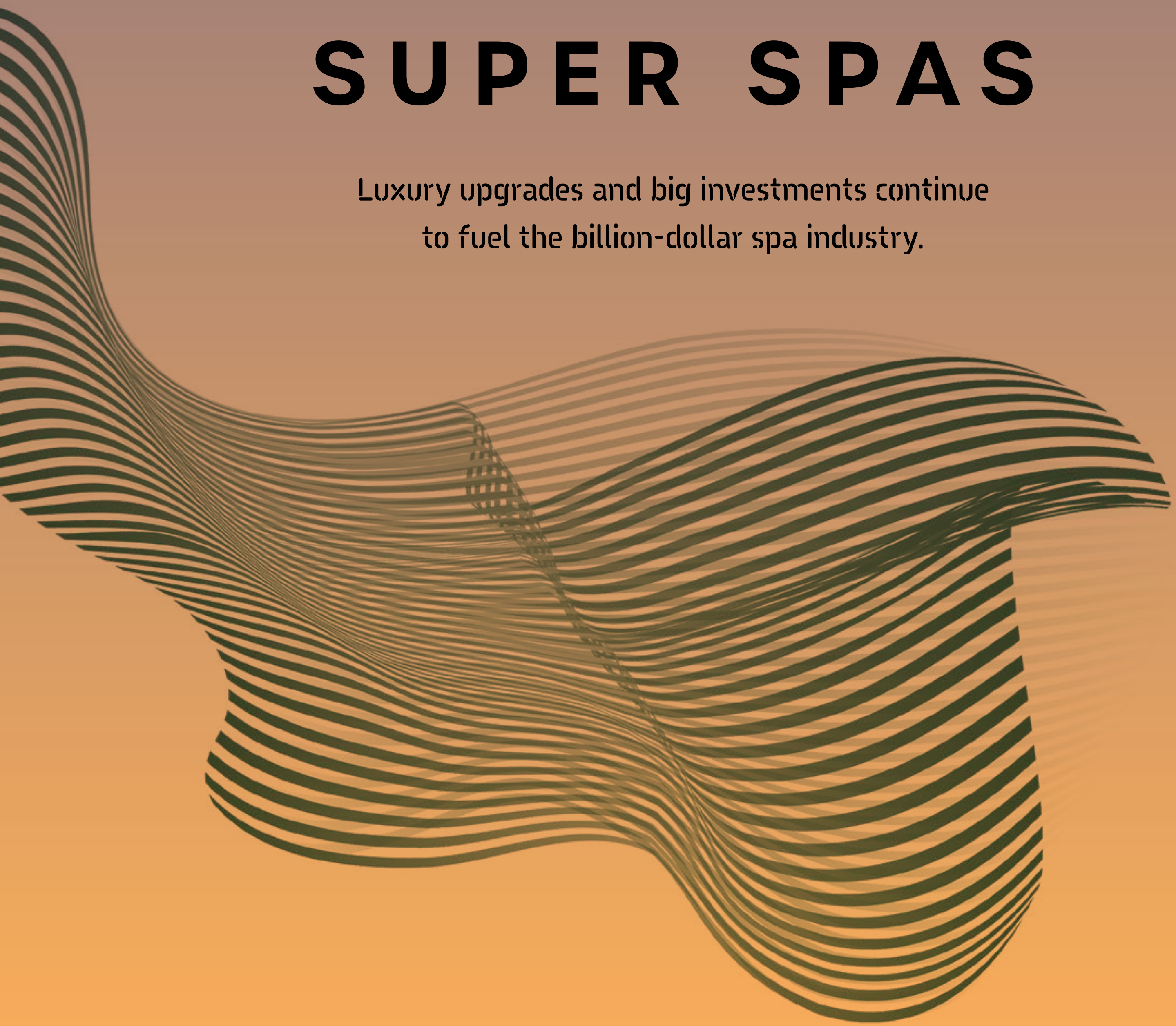
GLOW RECIPE
BACK TO SCHOOL:
GLOW ESSENTIALS
GLOW SCHOOL IS IN SESSION!

Glow Recipe promotes its back-to-school Glow Essentials kits

59

SUPER SPAS

Luxury upgrades and big investments continue to fuel the billion-dollar spa industry.



The Wynn Al Marjan Island in the UAE has selected architect Lauren Rottet to design "the ultimate luxury spa experience," slated to open in 2027, reports *WWD*. Rottet suggests inspiration will be drawn from the Metropolitan Museum's Manus x Machina exhibition, which explores the connection between the handcrafted (manus) and machine-made (machina). Rottet's other projects include the Surrey, a Corinthia Hotel in New York, featuring a Sisley Paris spa, which opened at the end of 2024, and the Belmond Cap Juluca Guerlain Spa, which opened in July 2024.

The predicted value of the spa market in 2025 is just over $207 billion, given a CAGR of 13.2% from 2024 to 2030, according to analysis by Grand View Research. Growth in the industry is fueling luxury upgrades to better differentiate spa offers.

In Scotland, family-owned hospitality group SimpsInns recently announced a £3 million ($3.8 million) investment in an upcoming sea-view spa at the Waterside Hotel in West Kilbride, Ayrshire, due to open in 2025. Guests at Si! Spa will have access to a range of wellness treatments, a sauna, a steam room, and an outdoor hydro pool, as well as relaxation spaces.

The Grey Wolfe wellness space, which opened in Barnes, London, in 2021 with a pay-as-you-go model, transitioned into a private members' club in 2024, to promote a wellness journey rather than a one-off experience.

WELLNESS SHOULD BE ABOUT CURATION AND PERSONALIZATION.

Sarah Jones St John, founder, Grey Wolfe

“Wellness should be about curation and personalization rather than a simple transaction,” says Sarah Jones St John, Grey Wolfe’s founder. “Driving change from the inside, delivering and supporting authentic wellbeing, immersive wellbeing experiences that appreciate lifestyles, life stages, and individuality in our Grey Wolfe membership.”

The Surrenne luxury wellness club in London opened in April 2024, offering memberships for £10,000 ($12,550) per year, on top of a £5,000 (around $6,000) initiation fee. According to Surrenne, the membership is an “investment in your holistic wellbeing, and an exploration of boundless wonder.” This aligns with VML data, which reveals that 83% of people agree beauty is about inner wellbeing rather than looks.

Why it’s interesting

As more people put a premium on their health, spas are also upleveling, offering state-of-the-art equipment, treatments, and more.

White onyxtreatment room, Surrenne

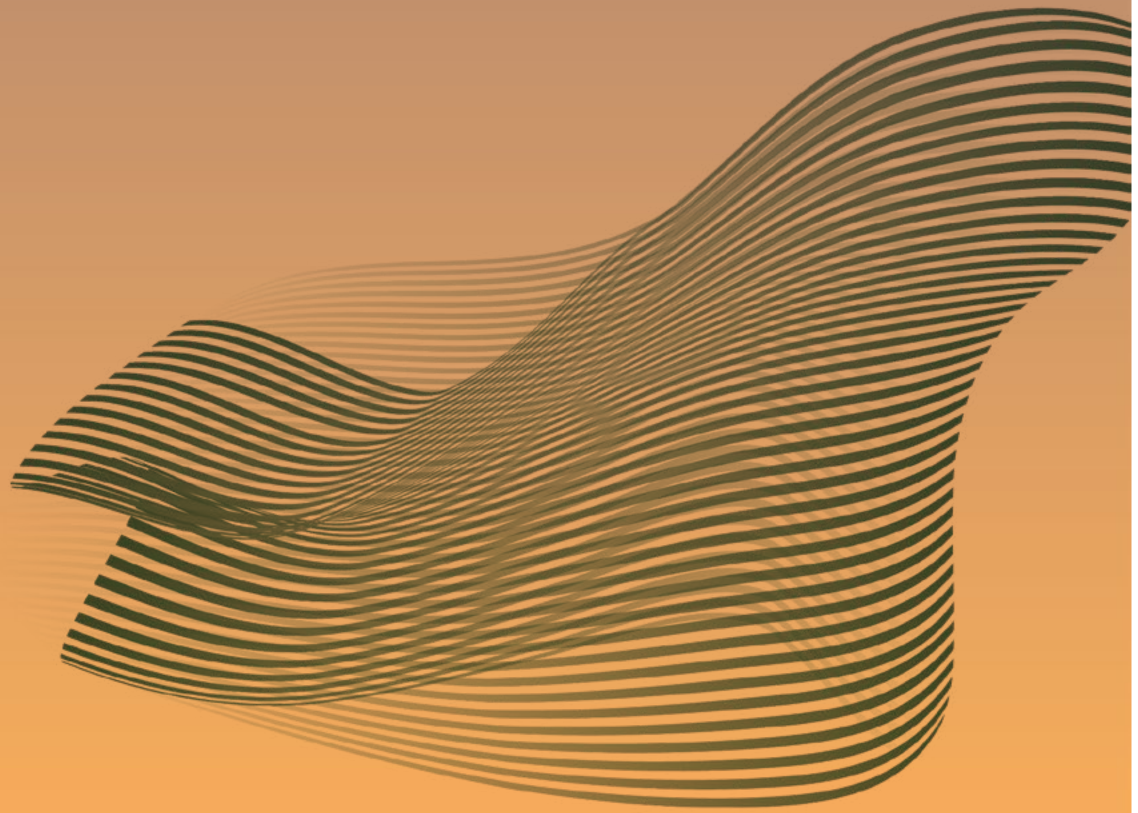
59

Pool, Surrenne

60

SCALP HEALTH REVITALIZED

Density is emerging as a pivotal focus in haircare.



OWH
OWH REVITALIZE AND REPAIR
ANTI-HAIR LOSS ESSENCE
OWH 焕活修护防脱精华液

OWH anti-hair-loss serum. Courtesy of OWH

Onion+ Peptides Hair Stimulation System, Tara

According to Google Trends data, searches for hair density have steadily doubled over the past five years, peaking in popularity in late 2024. Once a niche category, hair growth is making a strong comeback, with both specialist brands and beauty giants rolling out follicle-stimulating innovations.

Several factors drive this renewed interest. Stress is a significant driver of hair loss and thinning, and two-thirds of people worldwide say it affects their daily life, according to 2024 Ipsos data. The surging usage of medications such as Ozempic, known to cause hair thinning, is also a key contributor, along with the hormonal shifts related to perimenopause and menopause. Women in the latter demographic—highly engaged and willing to invest in effective haircare—have long been underserved.

Research from Medihair reveals that 85% of men and 33% of women will face hair loss, underscoring the need for targeted solutions across a broad audience.

“This is an issue that troubles both genders,” Dr Bochuan tells VML Intelligence. He is the lead research scientist for OWH, an anti-hair-loss serum that launched last September in APAC. “Revitalizing and repairing the scalp is crucial, as it’s like another layer of skin that requires tender treatment and protection.”

Brands such as Beyoncé’s Cécred and Coco & Eve exemplify this trend. Cécred’s Restoring Hair and Edge Drops are designed to increase density by 1.5 times, and Coco & Eve’s Tripeptide Hair Density Serum promises a 214% growth boost, according to *Vogue*. Tara, a new self-care brand launched in October 2024, also emphasizes scalp health and clean, potent ingredients to support hair’s vitality.

Why it’s interesting

This industry-wide focus on density not only aligns with beauty but also with self-confidence and overall wellbeing, cementing a new era of skinification in haircare.

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RETAIL

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AWESPERIENTIAL RETAIL

Stores and malls are morphing into purveyors of awe, and Asia is leading the way.

SKP-S Paradox Universe, Wuhan. Courtesy of Sybarite

Retailers are emphasizing “awesperiences”—immersive experiences that inspire a sense of wonder—to drive footfall and buck a wider downward trend. Consumers are craving sensory and tactile stimulation: 85% of global shoppers say the great thing about physical stores is that stores can engage all their senses, and 84% say browsing in store is the best way to get inspired while shopping.

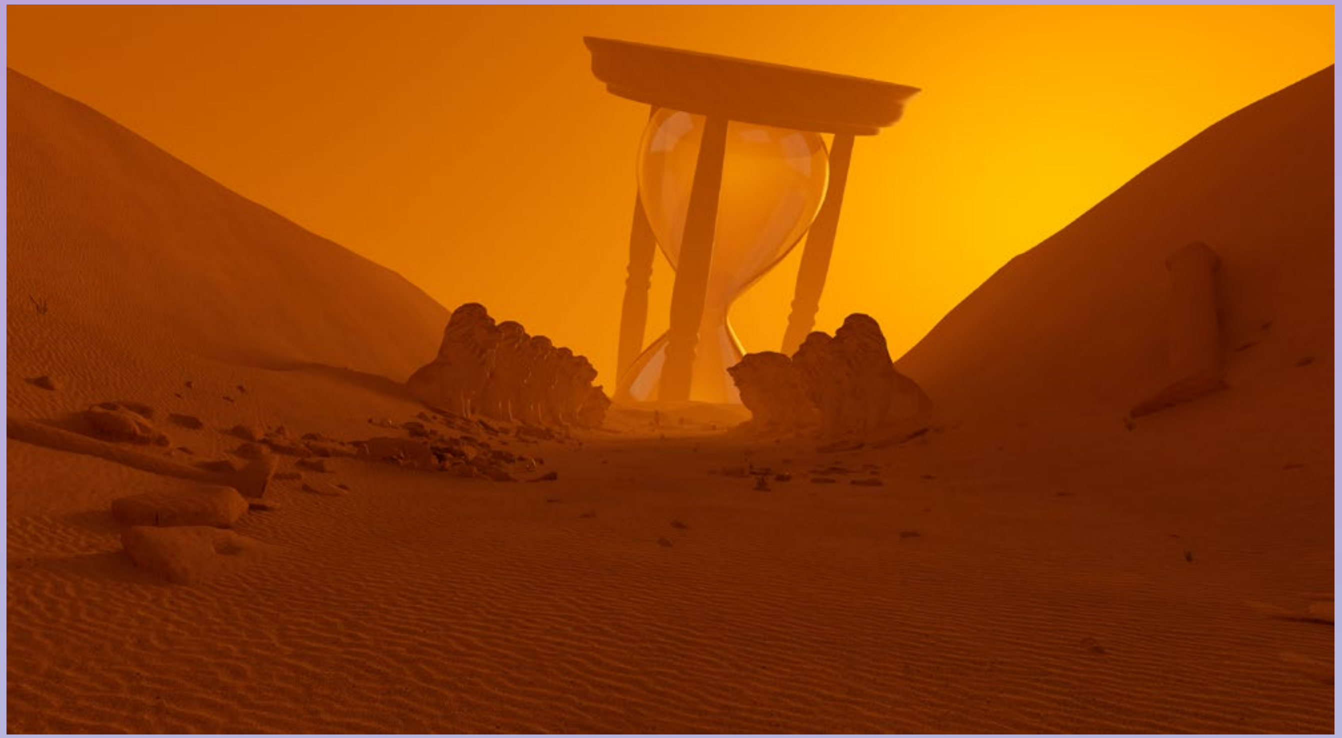
Asian stores and malls are pioneering the trend, including Korean eyewear brand Gentle Monster. The brand’s latest project, Insect Kingdom at Haus Nowhere Shenzhen, crafts a fantastical otherworldly narrative peopled by captivating kinetic sculptures and art installations. Described as “a vast universe with its own narrative," the space tells "a fictional tale of the 10,000-year relationship between giants, insects, and animals."

In China, SKP launched its latest outlet in Wuhan in summer 2024. Designed by architectural studio Sybarite, it features a fourth iteration of SKP-S, the experiential space devoted to a younger audience. SKP-S plays host to an immersive, sci-fi-inspired world centered on the theme of Earth 2124, where contrasting elements—animatronic arctic wildlife, industrial remnants, and boundless exploration—fuse to symbolize resilience and transformation.

"Stepping into otherworldliness (and shifting between space and time) is what people desire," Sybarite's cofounder Torquil McIntosh tells VML Intelligence. "Extending reality's boundaries makes the impossible seem possible, bringing a sense of wonderment."

New urban district One Bangkok offers a "rhythmic retail experience," blending shopping and lifestyle with an emphasis on deeper engagement. The Retail Loop comprises 900 stores across three shopping destination zones—Parade, The Storeys, and Post 1928; the Food Loop hosts 250 restaurants including Pura Brasa, Wolfgang's Steak House, and Hattendo; and the two-kilometer Art Loop features sculptures by Anish Kapoor and Tony Cragg. The official opening featured 500 performers and crew, a visual spectacle of light and color projections, and a four-act show curated by Auditoire, one of the producers involved in the opening ceremony of the Paris Olympics.

In the Parade zone, travel retailer King Power's new City Boutique offers an experiential shopping journey. The 5,000-square-meter space features



Above top: The Extraordinary Journey, Vacheron Constantin & Harrods, Xydrobe at Harrods. Courtesy of Sybarite
Above: SKP-S Paradox Universe, Wuhan. Courtesy of Sybarite

bold white interiors designed by Hayon Studio interspersed with Here and Now—a series of sculptures of giant birds.

Consumers continue to prioritize experience: 74% say stores should offer more than products and strive to entertain and engage shoppers, and 79% agree shopping should be a multisensory experience. Retailers that emphasize cultural engagement alongside retail are outperforming the market. In China, K11 Musea and K11 malls registered strong traffic during Golden Week despite the wider slowdown in luxury, *Jing Daily* reported. Dong Chao, director of the Circulation and Consumption Research Institute at the Ministry of Commerce in China, told *People's Daily* that "physical retail is prone to hitting a development bottleneck of high popularity but low consumption. By incorporating experiences like entertainment and curated spaces, these complexes can foster a sense of belonging among young people, thereby driving consumer spending."

Why it's interesting

Retailers that lean into awe-inspiring experience are showing resilience. As *Jing Daily* observes, "combining commerce with cultural engagement is not just an option but a necessity."

Here and Now sculptures at King Power City Boutique, Bangkok, Hayon Studio

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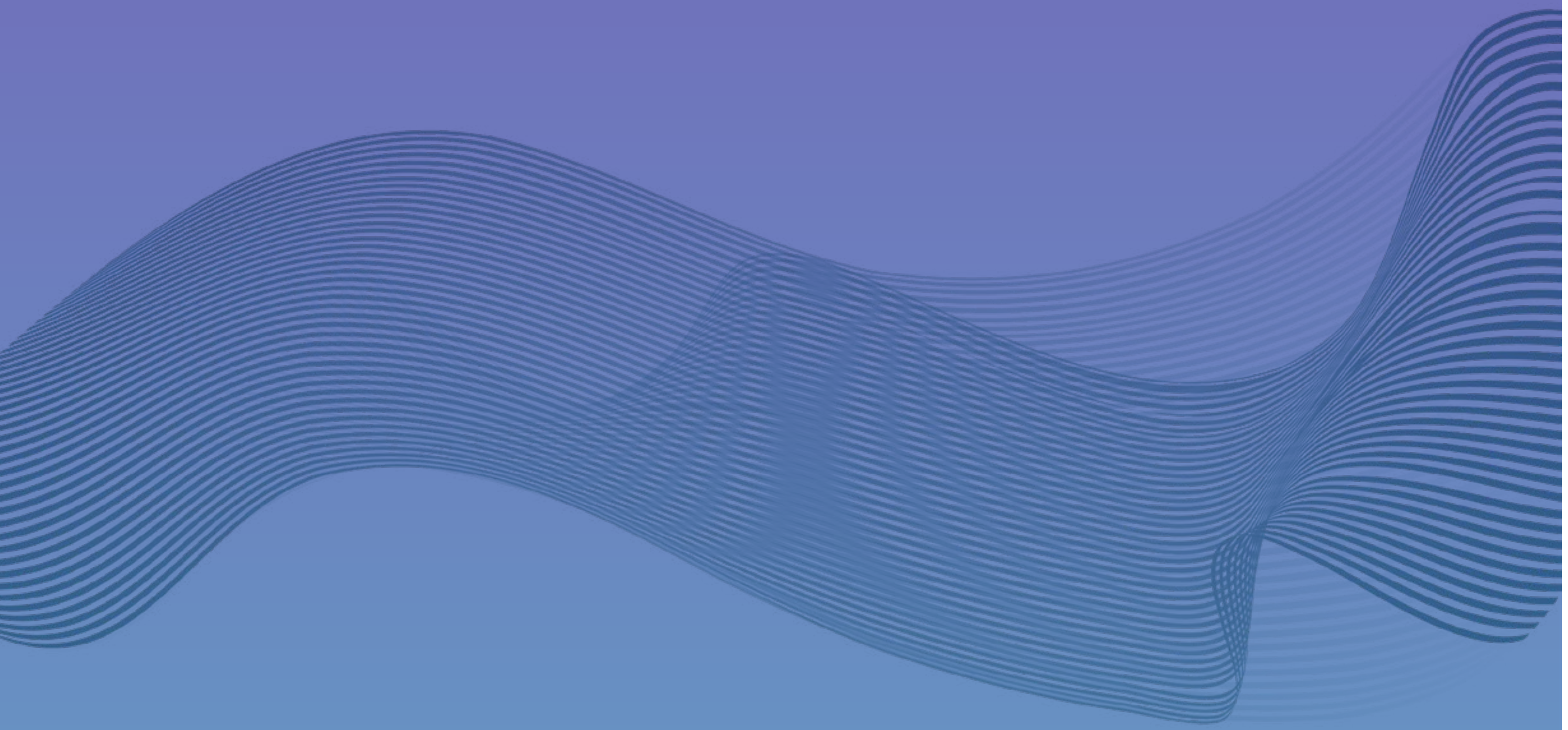
PRUDENT PRICING

As purse strings tighten, shoppers are diversifying how and where they shop, and brands are responding with creative offers.



The cost-of-living crisis—a much-quoted term in 2024—is expected to attract more column inches over the coming year as life remains too expensive for many. VML Intelligence data shows that cost of living is the leading concern people believe society faces today. This, in turn, is changing consumer shopping habits.

In the United States, some consumers are “treasure-hunt” grocery shopping—buying from several different stores—to make savings. NBC’s *Today* show cited research that suggests people are buying from an average of 20 different grocery stores over the course of a year, up from 16 stores a year earlier. Walmart is benefiting from value-seeking shoppers who have switched their allegiance from higher-priced stores, according to the *New York Times*.

Brands and retailers continue to find ways to show allyship, crafting creative promotions to help stretch household finances. In the United States in November 2024, Amazon launched a beta version of its Amazon Haul storefront on its app, with over 300 million products capped at $20 for price-conscious consumers.

KFC gave fast-food fans in New Zealand the chance to make purchases with fake cash in a one-day “KFCurrency” promotion in October 2024. Customers could swap any board-game money or tokens for three popular menu items: 2x Secret Recipe Chicken and fries, 2x Hot & Crispy Boneless and fries, or 6x Chicken Nuggets and fries.

Choose a Price.

The Daily Set now has three price options to choose from:

Regular price
23% off
40% off

The Ordinary.
The Daily Set
The Ordinary.
The Ordinary.
The Ordinary.

The Ordinary's "Choose a Price" promotion in late 2024 aimed to make its skincare products more accessible by inviting shoppers to pay what they could afford—either full price ($21.70), 23% off ($16.71), or 40% off ($13.02). The brand's social media messaging emphasized that the success of the strategy rested on its community: "Those who are able to pay the regular price will support our ability to make this idea possible."

Grocery retailers such as Penny have been pledging to freeze their prices. The German supermarket chain overhauled the packaging of its own-label range in Argentinian stores to include fixed price tags, indicating to shoppers that prices will remain the same for a long period.

Established mainstream brands have also been forced to demonstrate their value beyond low prices. Walmart—often seen as the barometer for America's buying habits—raised its forecasts in August 2024 after gaining market share with consumers, particularly the wealthiest households.

The Ordinary Choose a Price. Courtesy of The Ordinary

0.99
PENNY
1.09

Known for its everyday low prices across categories, it has been investing in technology to strengthen its supply chain, and ecommerce capabilities to make shopping easier and quicker for consumers.

The economic outlook for 2025 continues to drive uncertainty. In Europe sentiment varies, according to Jemma Conner, research manager at YouGov. "A plurality of people in Germany (57%), France (53%), Britain (45%), and Sweden (42%) think that in 12 months' time their country's economy will be in a depression or recession," she tells VML Intelligence. "Fewer than 10% of people in any of the countries polled are optimistic enough to think the economy will be growing."

Why it's interesting

As shoppers trade down and opt for cheaper product lines in the tough economic climate, brands cannot rely on price as their main differentiator—they will have to work harder to communicate their added value to savvy shoppers.

Penny's price packs

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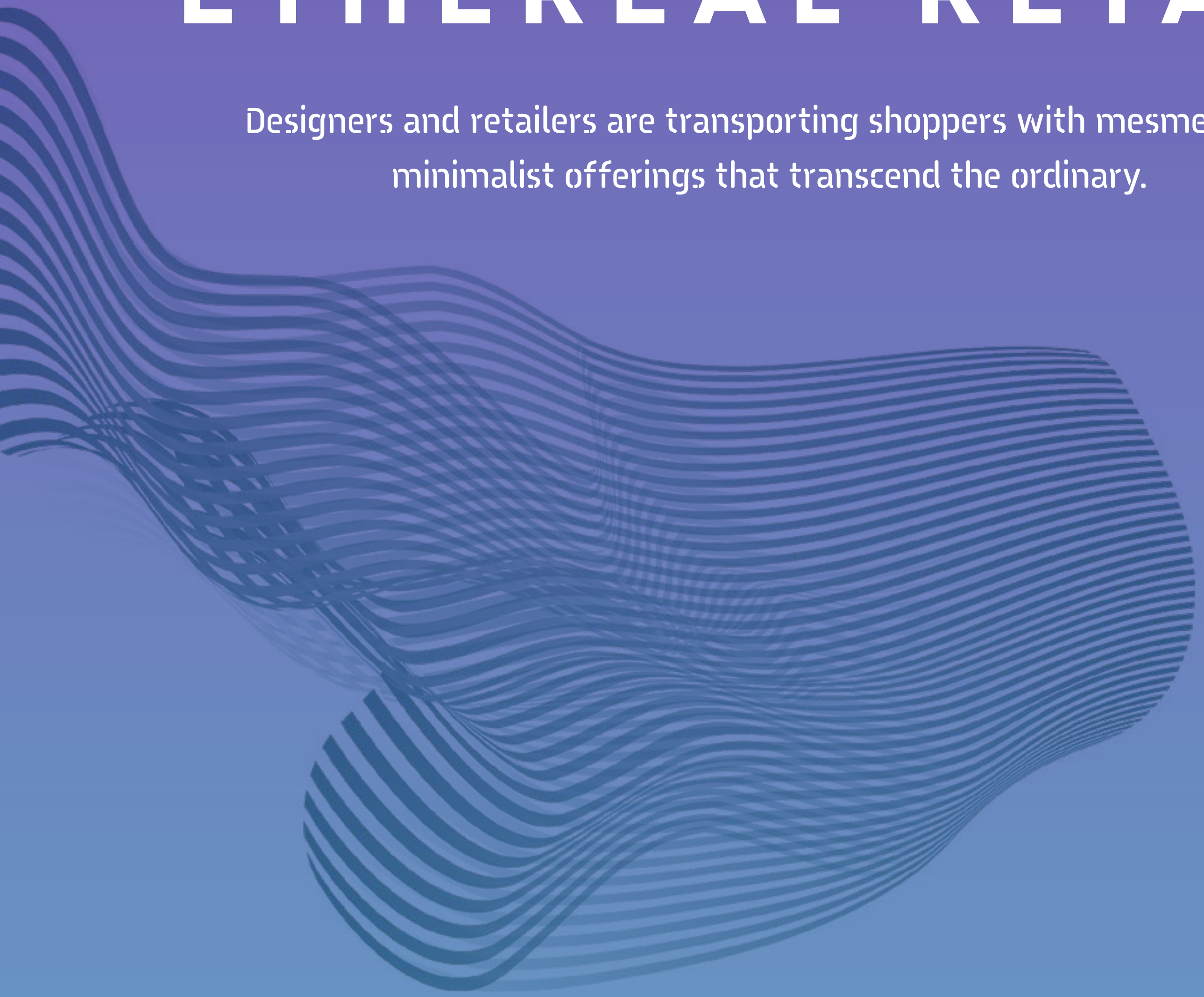
ETHEREAL RETAIL

Designers and retailers are transporting shoppers with mesmerizing minimalist offerings that transcend the ordinary.



Aurora (Loophole in the Sky) installation at Siam Paragon, Bangkok, by Pascal Dombis. Courtesy of Siam Paragon

A giant circular color wheel sits on the roof of the Siam Paragon shopping center in Bangkok, Thailand, inspired by the northern lights. Designed by French artist Pascal Dombis, the aptly named Aurora (Loophole in the Sky) installation is made up of 24 lenticular panels that give the optical illusion of a shimmering, colorful wheel. Debuting in August 2024, it aims to captivate the attention of passersby, much like the aurora borealis. “My intention is to elevate the visitor’s gaze through dynamic and extravagant perspectives,” Dombis tells VML Intelligence. “While the panels of the oculus remain fixed, they generate a flow of color, aiming to draw Siam Paragon visitors toward a reimagined sense of the sublime.”

In New York City’s Meatpacking District, Oases comprises five distinct spaces: a café, a bar, a restaurant, a courtyard, and a shopping bazaar. Taking inspiration from ayurvedic cues, it aims to “invigorate the five senses” of shoppers through its curved design, product curation, and wellness activities. The site promises to provide an “evergreen escape” from the bustling city as well as an outlet for “healing and wellness in a beautifully contemporary way.”

During the London Design Festival, whiskey brand Johnnie Walker featured Liquid Light, an installation in collaboration with art collective Marshmallow Laser Feast. A series of glass-blown droplets were suspended in an atmospheric room lit by a moving light, which cast ethereal shadows on the surrounding walls and entranced visitors with the gentle movement and musical score.

Fashion designers are also finding simplicity in shape and movement. Loewe’s spring/summer 2025 women’s show was themed around “radical reduction”—stripping away the extraneous and focusing on the silhouette. Creative director Jonathan Anderson aims to allow the fabric to speak as the model moves, describing it as “bending, bouncing, flowing in curves, long or crudely cropped, moving sideways and away from the body, like falling into and out of a dream.”

Why it’s interesting

Retail spaces and brands are dazzling visitors with minimalist, inspiring features, captivating consumers by reducing the noise around them and allowing simplicity to shine.

Liquid Light by Marshmallow Laser Feast and Johnnie Walker, London Design Festival 2024. Courtesy of Mel Yates

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MID-LIFE CONSUMERISM

Maturing millennials have more spending power than ever before and their exacting tastes are impacting consumer goods.

NNABI
peri essential 5
daily botanical support specifically designed for perimenopause
Doctor Formulated
DIETARY SUPPLEMENT
NNABI

Millennials are the most contented generation when it comes to feeling positive about their lives. They are driven by values, health, and experiences: 81% want to spend on brands that reflect their values; 88% say people should take more responsibility for their own health; and 75% prefer to spend money on experiences rather than things.

Millennials' rising wealth means they're garnering more spending power. In 2024, millennials were projected to have 22.5% of global spending power, edging close to gen X's 23.5%. Born between 1980 and 1994, the eldest millennials are now in their mid-40s. While this is a time typically associated with the midlife crisis, 81% of American millennials "can't afford to have one," according to a survey by Thriving Center of Psychology. Despite their increased influence as consumers, they are a cost-conscious generation seeking purchases that go the extra mile.

Research from subscription platform Bango found that millennials are the subscription generation, with the average US millennial having between six and 11 subscriptions. Seeking to tap into millennials' appetite for both

Nnabi

> **81% OF US MILLENNIALS REPORT THAT THEY CAN'T AFFORD TO HAVE A MIDLIFE CRISIS.**
>
> Thriving Center of Psychology

aesthetics and practicality, AllSaints launched subscription service AllSaints Rental in October 2024, allowing unlimited access to its collection for £79 ($100) a month.

Brands are also catering to millennials' new life stages—after all, 41% of millennials say they are spending more on health and 77% like the idea of living a long and healthy life to over 100 years old.

With the oldest millennial women entering perimenopause, wellness brands are targeting this group with products, appealing branding, and frank communication. Launched in February 2024, US startup Nnabi is the "first-ever perimenopause-dedicated company" on a mission to educate and untaboo this life stage, and cofounders EJ Kim and Marina Pen take an approach of empowerment. "It's important to highlight the power women in peri (perimenopause) have and how much of a driving force they are, so that our biology does not minimize our potential and possibilities," Kim tells VML Intelligence.

For the andropause (male menopause), UK-brand Manual offers a testosterone test-at-home kit to monitor decreasing testosterone levels. This can then be treated with its Testosterone Support capsules or more powerful injectable, oral, or topical testosterone, all overseen by medical experts.

According to a 2023 WARC study, 83% of parents will be millennials by 2027, and over half (51%) of global millennial parents say they are spending more on their children—enter brands upleveling the experience for kids. In October 2024, San Francisco-based health brand Brainiac Foods announced its new Neuro+ line of nutritious baby food pouches, designed to be beneficial to brain development.

From diapers and skincare to food and fashion, the babycare products market was predicted to be worth almost $240 billion in 2024 and will almost double to $419.43 by 2032, according to Fortune Business Insight.

Why it's interesting

Millennials are all grown up and expect brands to be targeting them in a way that reflects their new life stages and spending habits, from subscription models to health-oriented brands that are equal parts functional, convenient, empowering, and fun.

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STRESSED SHELVES

The battleground for brands has grown fiercer on the supermarket shelves.

Retailers are trimming the number of lines they carry and, in the economic downturn, shoppers are trading down and adopting thriftier habits. This is creating challenges for brands vying with own-label ranges to keep their space on the shelves, as reported by the *Wall Street Journal*.

In the United Kingdom, supermarkets are upping the ante on their own-label ranges at the expense of brands. Kantar data shows an 8.8% rise in the take-home value of own label, while brands faced a decline of 2.4% over the same period. It's a similar picture across Europe, with private label on the rise for almost all FMCG categories, according to Circana data. In the United States, sales of private-label brands are also outperforming national brands. This all comes as brands continue to fall behind on innovation, according to Mintel's Global New Product Database, which tracks new products launched in the food, beverage, beauty and personal care, healthcare, household goods, and petcare markets.

For the first five months of 2024, just 35% of global consumer packaged goods (CPG) launches were genuinely new products (as opposed to "renovations" like line extensions or relaunches), the lowest proportion recorded since Mintel's tracking began in 1996.

So what's behind the slump? According to Dan Quinn, head of innovation at The Forge, much branded innovation in recent years has focused on some aspect of premiumization of product or experience. "Covid, perhaps, accelerated this, as it seemed that people were quite willing to spend a little more for a slightly more indulgent in-home experience," Quinn tells VML Intelligence. "Now, however, trade and consumer receptivity to these upgrades seems to have reached its limit—and finding genuine new pockets of relevant value is not straightforward."

Mintel points to myriad challenges for new product development in food and drink, including increasing costs, raw material shortages, downsizing, and increased scrutiny from consumers in pursuit of greater value for money—leaving “little time left for blue-sky thinking.”

So how are manufacturers fighting back? “Brands are placing significant resources behind reinforcing the ‘value’ that their core products deliver in order to insulate themselves against private label or discounter copycats,” observes Quinn, who gives the example of Magnum’s “Stick to the Original” 2024 campaign, which focused on redesign and comms that underscore original quality.

Accelerating the ideation process is another advantage. “Creative concept development and prototype realization has proven to be real strengths of generative AI tools and enabled approaches,” says Quinn. “However, brilliant brands and propositions truly move people—they successfully create value by striking a raw note of aspiration or frustration and they execute against this sensitively and persuasively. The ability to identify real human needs and express them with truth and power is something that AI can help with, but, for now at least, human empathy and intelligence feels integral.”

Why it’s interesting

With CPG brands set to come under more pressure as new challengers and own labels fight for share of shelf space, it has never been a more important time to innovate. Brands leveraging generative AI to quickly identify shifts in consumer behaviors and preferences will be better placed to put people’s true needs at the heart of their innovation process.

> **BRANDS ARE PLACING SIGNIFICANT RESOURCES BEHIND REINFORCING THE ‘VALUE’ THAT THEIR CORE PRODUCTS DELIVER TO INSULATE THEMSELVES AGAINST PRIVATE LABEL OR DISCOUNTER COPYCATS.**
>
> Dan Quinn, head of innovation, The Forge

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ADAPTIVE FASHION GOES MAINSTREAM

Mainstream retailers are upping the provision of clothing with adaptive features.

Adaptive fashion is moving toward the mainstream, as retailers including Marks & Spencer and Anthropologie launch inclusive collections and labels to better serve customers who want adaptive features with style.

Adaptive clothing primarily caters to those with disabilities, but the market for practical fashion extends even further to neurodiverse people with sensory sensitivities, seniors with reduced mobility and dexterity, post-surgery patients, and, well, anyone who likes the convenience. The demand for better provision is pressing: according to the Research Institute for Disabled Consumers, 59% would buy more adaptivewear if it was available from mainstream retailers.

Fashion retailer Anthropologie has collaborated with disabled influencers and the wider community on a collection of adaptive pieces based on

Adaptive kidswear, Zalando

pre-existing styles and modified with different closures, proportions, or details for better comfort. The approach reflects feedback from the community to access the same styles as everyone else, rather than separate "special" lines. While the launch collection comprised just eight pieces, the brand insists it's not a one and done, with more designs in the pipeline.

Online multibrand retailer Zalando, which first launched adaptive collections in 2022, boosted its offer in September 2024 with a line of stylish basics for kids, under the private labels Friboo and Yourturn Kids. It has also added styles from brand partners including adaptive footwear lines from Boss, adaptive training wear from Adidas, and a selection of backpacks and crossbody bags by JanSport.

"The UK's largest knicker retailer," Marks & Spencer sells over 60 million pairs per year. In August 2024, it became the first mainstream store to introduce underwear designed with an internal pocket for stoma users, inspired by the experience of employee Jiggy Sohi. Primark has also announced plans to offer affordable accessible ranges in a collaboration with award-winning adaptive designer Victoria Jenkins. The retailer launched its first adaptive lingerie collection in January 2024.

Stoma underwear, Marks & Spencer

Mindy Scheier is a former designer and stylist at the forefront of the adaptive fashion movement. She established the Runway of Dreams Foundation after her son, who has muscular dystrophy, wanted to wear jeans like his peers. The foundation partnered with Tommy Hilfiger on the first major adaptive clothing line for children (covered in "The Future 100: 2019" trend #35, Inclusive design), and now collaborates with a range of prominent brands, including Kohl's, Target, JCPenney, and Zappos.

Scheier tells VML Intelligence that the adaptive fashion movement is gaining momentum thanks to ongoing social and cultural progress, and she is excited about her work with Victoria's Secret—the brand's new VS & Pink Adaptive line features bras, bottoms, and period underwear with magnetic closures and adjustable front straps. The designs were developed based on extensive feedback from people with disabilities through wear testing, focus groups, and feedback panels.

Why it's interesting

Scheier suggests that the adaptive fashion movement will surely extend from high-end to budget-friendly options in 2025. However, she also notes the importance of brands incorporating meaningful support for people with disabilities in their products, services, and marketing efforts—and even within their own organizations. "If there are no executives with disabilities on staff," she notes, "a brand's commitment to inclusivity may lack authenticity."

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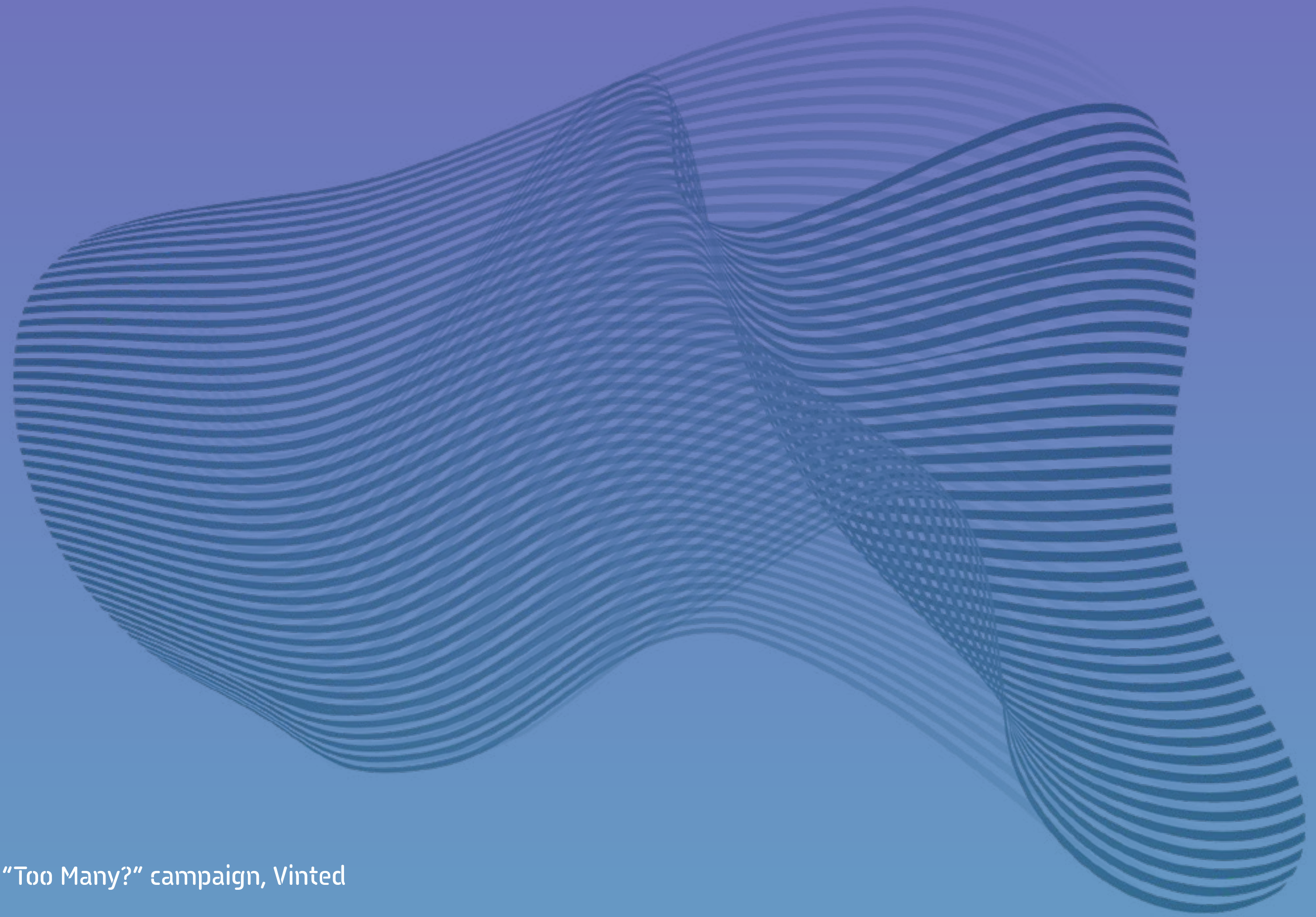
VS & Pink Adaptive line, Victoria's Secret

67

UNDERCONSUMPTION

A growing movement is promoting the virtues of consuming less.



“Too Many?” campaign, Vinted

Amid the endless social media hype cycle, the #underconsumptioncore trend is flourishing. This movement espouses—and seeks to normalize—owning just a few pairs of shoes and an everyday wardrobe instead of a continual array of new things; toting the same water bottle rather than showing off a shiny new one; and using up the last drops of a tube of foundation as opposed to displaying your latest cosmetics haul.

In a September 2024 post that achieved over 521,000 likes as of January 2025, Danish sustainability influencer Gittemarie Johansen discussed how “fast-fashion, overconsumption, and influencer culture has helped normalize some pretty messed-up behavior.” She ends by stating “buy less crap and stop following the influencers [who] romanticize overconsumption.”

Brands with skin in the secondhand game are also tapping into overconsumption, such as Vinted’s tongue-in-cheek “Too Many?” campaign that encourages people to sell their excess fashion via the secondhand marketplace. The campaign points out the futility of owning multiple versions of an item of clothing, from a man with numerous ties around his neck to a woman dragging a long line of handbags.

Writing in *Forbes*, consumer expert Greg Petro wondered, when it comes to consumer spending, whether the underconsumption trend is the “canary in the coalmine” that could point to a forthcoming recession (see Prudent pricing, page 172). Petro cited 2023 figures from the Private Label Manufacturers Association in the United States, showing that 64% of gen Z shoppers said they always or frequently buy store brands and 51% always or frequently choose a place to shop because of its store brands. “The revenge spending of last year has become this year’s buyer’s remorse and overextended credit card balances, “ he added. “The rate of inflation may have dropped, but food and housing prices are still substantially higher than they were before the pandemic.”

Gen Z’s frugality may be capturing attention thanks to its visibility on social media, but VML data suggests a shift to more considered consumption is extending across all cohorts: 69% globally say they are now actively looking to buy or own less “stuff” as a lifestyle choice, a figure that is fairly constant across all age groups.

Why it’s interesting

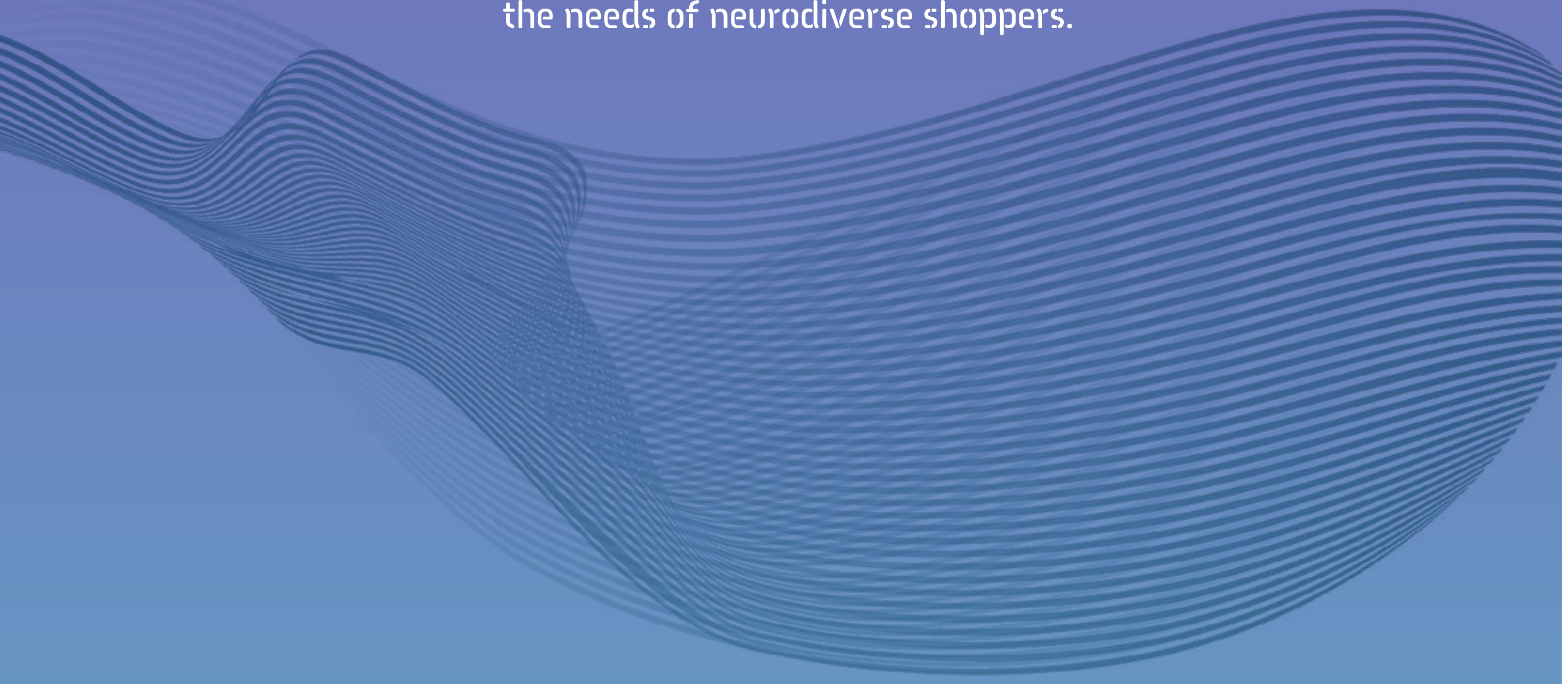
Whether motivated by finances, sustainability, or sheer overwhelm at consumer culture, a powerful voice on social media is emerging to push back against overconsumption while consumers of all ages are trying to make do with less.

“Too Many?” campaign, Vinted

68

SENSORY-INCLUSIVE SHOPPING

Retailers are crafting experiences attuned to the needs of neurodiverse shoppers.



The world's neurodiverse community is more than 1 billion strong and growing fast. It includes individuals with a range of conditions including autism, dyslexia, ADHD, anxiety disorders, and more. Those who live with sensory processing issues may find shopping a challenge due to sensitivities to loud music, bright lighting, powerful scents, or complex and confusing layouts.

In recent years, stores and malls—including Walmart, Sam's Club, and Westfield—have introduced quiet hours, when lighting is dimmed and music and screens are switched off. There are opportunities to go much further than this and doing so will garner broad support, with 87% of people saying retailers should ensure stores are fully accessible to those with different needs.

Researchers at the UK's Centre for Autism at the University of Reading published a guide to autism-friendly shopping environments in 2024. Its six principles, all aimed at fostering calmer and more predictable experiences, include reducing sensory input such as bright lights, noise, and strong smells; making layouts more predictable; providing more space and clear layouts; and training staff.

La'Zette Lafontant, vice president of VML's Inclusion Experience consultancy, says principles like these have universal benefit. She tells VML Intelligence, "When we design retail spaces with neurodiversity in mind, we're positively expanding the shopping experience for everyone. If we think of it as innovation instead of accommodation, we will have spaces that serve all consumers authentically."

87% SAY RETAILERS SHOULD ENSURE STORES ARE FULLY ACCESSIBLE TO THOSE WITH DIFFERENT NEEDS.

Thanks to a partnership with sensory inclusion non-profit KultureCity, neurodiverse visitors to Lego stores in the United States and Canada, and the Lego House in Denmark, can now make use of sensory bags while they shop. The bags contain a clutch of useful items including noise-reducing headphones, visual cue cards to aid communication, strobe-reduction glasses, fidget tools, and a VIP lanyard to help staff identify those who might need additional support. The KultureCity certification is not only about the sensory bags, but also the broader training of staff and understanding.

Similarly, Tesco Mobile in the UK has also been trialing sensory support boxes in stores after conducting research which found that noise and lighting were the key causes of overstimulation. The boxes, which contain ear defenders, sunglasses, and fidget toys, are being tested in 50 stores before a national rollout.

The John Lewis Partnership is investigating ways to make its stores more sensory-inclusive according to its 2024 "Belonging" report, having introduced quiet hours in stores in 2022. The retailer is also bidding to attract more diverse talent, and in April 2024 announced it would post interview questions online to level the playing field for neurodiverse candidates who find traditional interviews stressful.

Considering the need to also excite and stimulate shoppers (see Awesperiential retail, page 169), retailers will need to consider how they can flex distinct zones or floors to appeal to different needs, along with sound and lighting systems that can adapt to different moods.

Why it's interesting

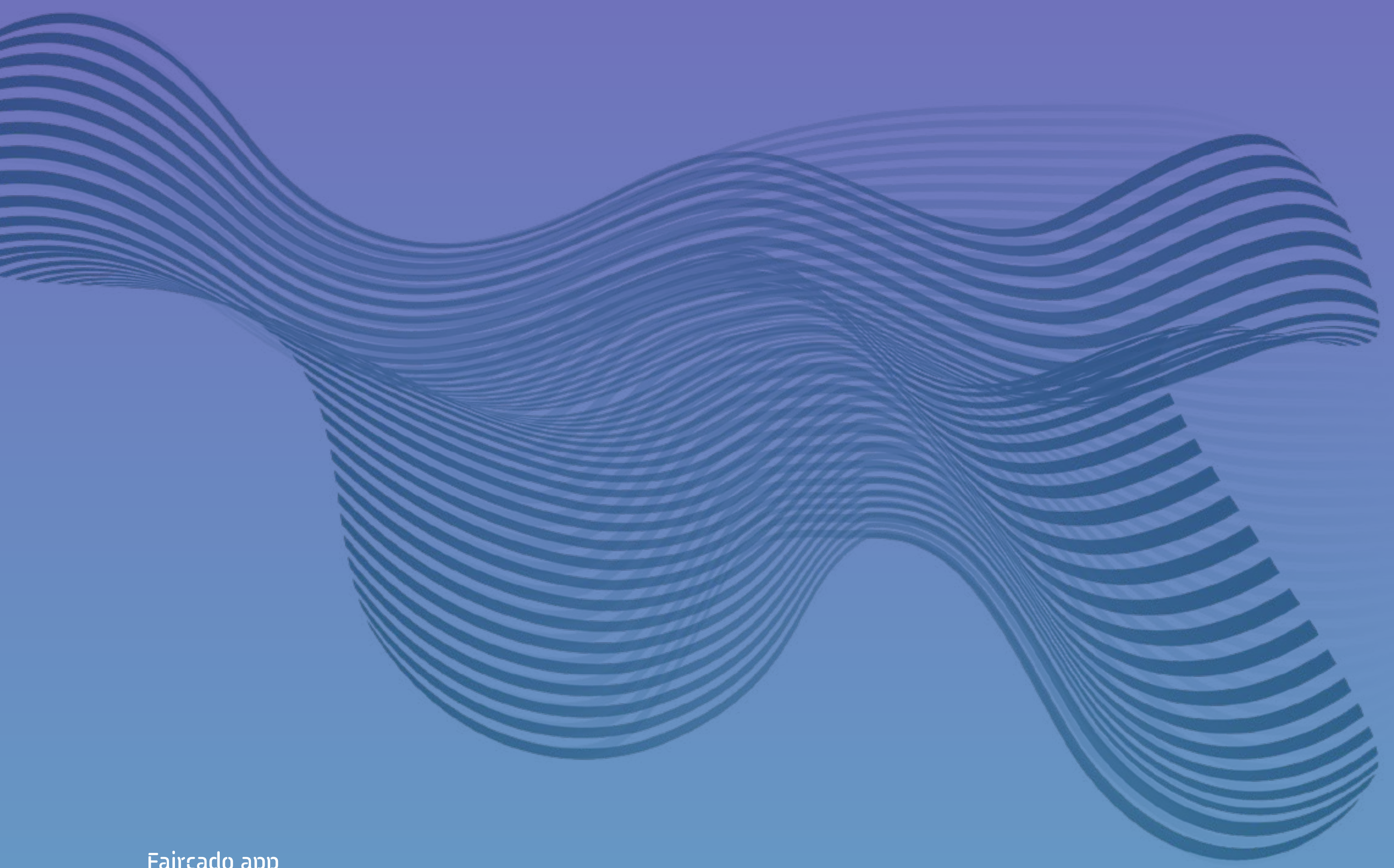
With more than a billion individuals in this cohort, supporting neurodiversity is not just about inclusivity—it's a strategic advantage. By designing for neurodiverse needs, retailers can attract a broader customer base, drive loyalty, and establish themselves as leaders.

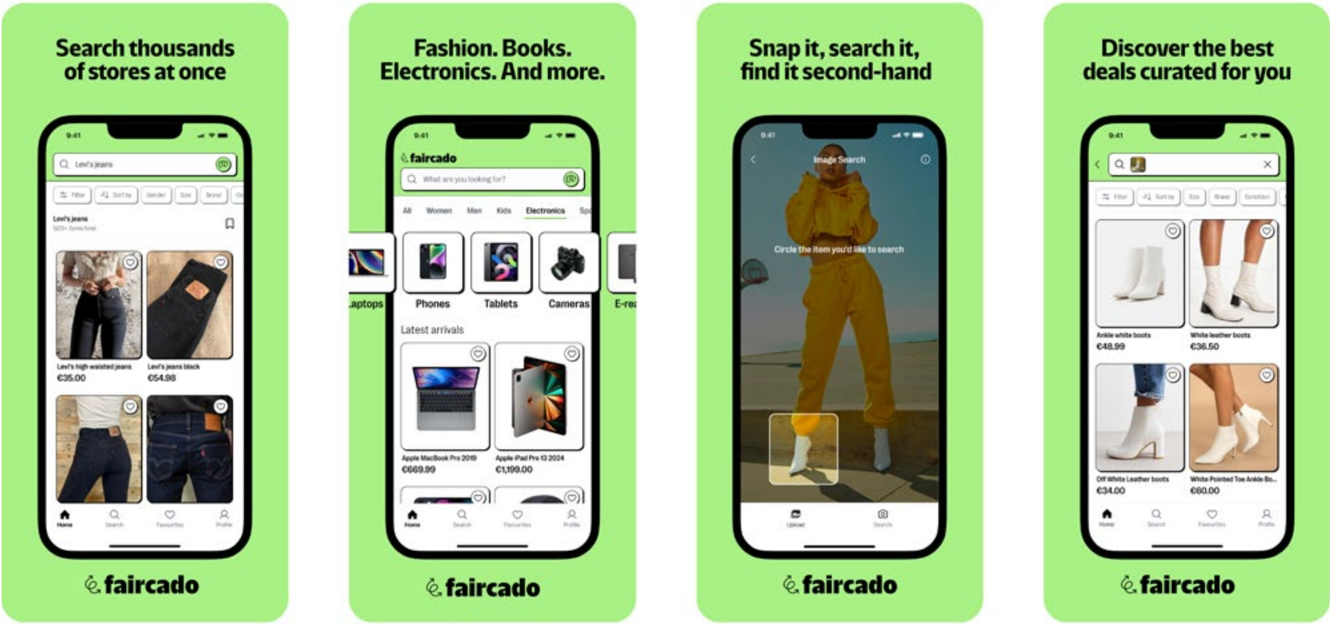
KultureCity X Lego House

69

AI DEAL HUNTERS

A crop of new AI tools are empowering shoppers to haggle on prices and deals—without even setting foot in store.




Search thousands of stores at once
Fashion. Books. Electronics. And more.
Snap it, search it, find it second-hand
Discover the best deals curated for you
faircado

Faircado app

AI sales agents that personalize the shopping experience are a dime a dozen these days. Michael Kors was the first to debut Mastercard's Shopping Muse tool for tailored product recommendations in June 2024, Klarna plugs ChatGPT into its platform for rapid recommendations, and Marks & Spencer uses AI to advise shoppers on outfit choices based on their body shape and style preferences, in an effort to boost online sales. And in October 2024, Google announced that it's tailoring the shopping experience to its users by adding a personalized feed of products based on their likes and preferences.

But it's not just product recommendations—AI is now helping savvy shoppers seek out the best deals. Global online fashion retailer ASOS is piloting Nibble, an AI chatbot that enables customers to negotiate prices on its sample sale site, to boost customer engagement. Developed by London-based Nibble Technology and launched in August 2024, the bot uses custom algorithms and behavioral science to adapt to user offers during negotiations, helping them secure discounts of up to 40%.

Good for the planet
and for your wallet
faircado
100% ECO
faircado
100% ECO

Tools like these are set to gain traction with consumers. When asked how they would like AI shopping assistants to help them, finding the best price came top of a list of 10 options, with 45% of global consumers in agreement.

AI is also revolutionizing the preloved retail world. Faircado is an AI-powered browser extension that helps shoppers scour the internet for the best prices on pre-owned, secondhand, or refurbished items. It won the world's biggest startup competition at Slush 2023 in Helsinki and was awarded a €1 million ($1.05 million) equity investment from well-known early-stage funds in Europe, including Accel, General Catalyst, Lightspeed Venture Partners, NEA, and Northzone.

For shoppers looking to maximize rewards and cash back on their purchases, Kudos has created an AI-powered smart wallet that recommends the right credit card to use. The app and browser extension identifies consumer spending habits to provide personalized financial advice, such as how to maximize rewards and utilize credit effectively.

Why it's interesting

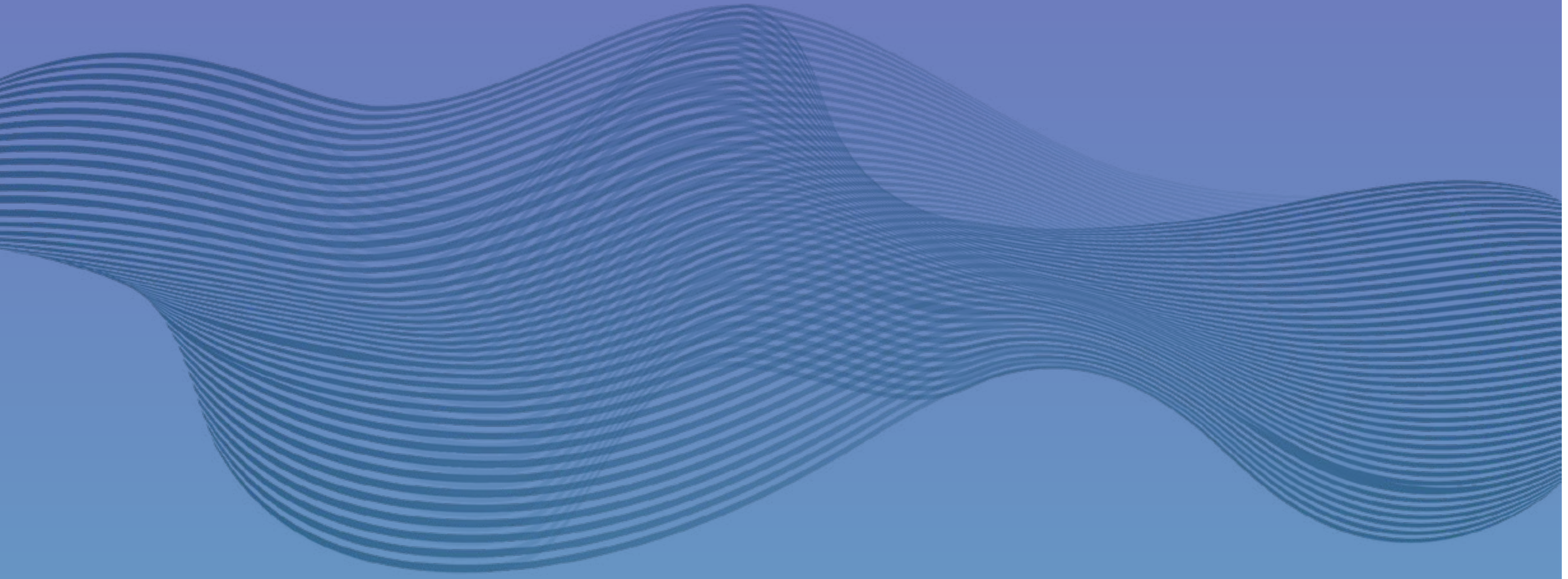
AI-powered negotiation tools are set to drive greater value for both consumers and businesses, helping advance personalized recommendations, boosting sale conversions, and making shopping more interactive.

Faircado app

70

BANKING EXPERIENCE REIMAGINED

As their footprints evolve, banks are reimagining their brands through the lens of experience.



Need financial advice with that latte? After years of closures, banks in the United States are now opening or refurbishing branches, creating friendly community spaces and hangouts with experience and advice at the center. The transformation extends to the digital realm, where banks are crafting innovative customer experiences.

Bank of America has tapped Rebekah Sigfrids—formerly of Sephora and Victoria's Secret—as its first in-house designer, creating spaces that are human-centric and resonate with their local communities, *Fortune* has reported. JPMorgan Chase is investing in rolling out a community-center model, with plans to open 100 branches in low-income rural towns and inner cities. Capital One has built a network of more than 50 cafés across the nation, offering coffee, baked goods, and space to work or network for customers—whether or not they are signed up with Capital One. Its latest Wynnewood Village branch, which opened in October 2024, is key to the revitalization of the community of Oakland in Dallas.

Community-centered experiences are a way to communicate brand values rather than drive revenue, as Jennifer Windbeck, Capital One's head of retail bank channels and operations, told the *Wall Street Journal*. "We are looking at the cafés as ways of expanding the public's exposure to Capital One," she explained, and staff are specifically trained not to make unsolicited approaches and sell to guests.

Banks are also aiming for friendly approachability in the digital realm. In the United Kingdom, Lloyds Bank has a redesigned app and refreshed brand identity that doesn't explicitly mention the word "bank." Its fresh, experience-led aesthetic style "speaks to an ambition to make the brand feel more down to earth," suggested *Creative Review*.

money
monzo
To apply for a Monzo Current Account, you must be 16+ and a UK resident. Ts&Cs apply.
Download your new favourite bank.

Similarly, Monzo is taking an emotional tack with its latest campaign, "Money Never Felt Like Monzo." In the ads, a series of distressing scenarios are transformed: an overflowing toilet becomes a fountain, a tarantula crawling erratically over a man's bald head becomes a head massager, and nails screeching across a chalkboard become a plucked harp. The implication is that the brand can make life better, not just manage your money.

Why it's interesting

By moving away from purely functional communication and embracing experience-led branding, banks are reflecting a broader financial-services trend toward customer-centricity.

> **WE ARE LOOKING AT THE CAFES AS WAYS OF EXPANDING THE PUBLIC'S EXPOSURE TO CAPITAL ONE.**
>
> Jennifer Windbeck, head of retail bank channels, Capital One

"Money Never Felt Like Monzo" campaign. Courtesy of Monzo

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LUXURY

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ELITE PETS

From five-star suites and private jets to designer accessories and smart toys—pets are living an all-round luxury lifestyle.

Jet Off With Zoomies Away

Bark Air. Courtesy of Bark Air

Pampered pets are being further indulged by "petrents" willing to splash out, and designer brands are all for it. After all, 77% of consumers report they are either maintaining or spending more on their pets, despite the economic climate. Chinese retailer Lane Crawford launched its first pet collection in July 2024, featuring beds, toys, clothes, and more. Fashionistas can flick through copies of *Dogue* magazine by *Vogue* for inspiration. The publication debuted in August 2024, catering to the high-fashion lifestyles of four-legged friends. Also in August, Italian designer brand Dolce & Gabbana launched an alcohol-free dog perfume, Fefé (which received some criticism from animal-right groups for interfering with dogs' sense of smell). As for Louis Vuitton's men's spring/summer 2025 pre-collection, creative director Pharrell Williams dedicates it to dandy dogs and their walkers. The collection includes a monogrammed canvas dog strap for $560, and a pooch-shaped bag is available for $5,400.

Smart pet devices are also adding more functionality. At the 2024 Consumer Electronics Show, several products on show aimed to elevate pet wellness. Minitailz, a biometric tracker for pets by French company Invoxia, offers early detection of potential health conditions, with the goal of a longer, healthier life. Australian startup Ilume has developed a smart feeding solution, consisting of an activity tracker and connected bowl that manages a dog's weight via calorie-controlled individualized nutrition.

When it comes to travel, pets are getting first-class treatment. On board Bark Air, the dog-first airline, passengers can find doggie champagne, "barkaccinos," and noise-cancelling earmuffs on the menu. The airline took to the skies in May 2024, debuting three destinations—New York, Los Angeles, and London—with prices starting from $6,000 for domestic flights and $8,000 for international routes. High demand encouraged the company to announce an October expansion of five new destinations and seven new routes.

And pet stays are not too shabby either. In Dubai, luxury pet resort My Second Home has opened Little Gems, a destination exclusively for small dogs. It is part of the resort's $10 million expansion plans to offer daycare and boarding facilities for dog owners.

The Hiramatsu Karuizawa Miyota hotel in Japan recently announced dog villa suites at an average rate of $2,200 a night for 2025. Guests can enjoy a private garden for dog runs, as well as gourmet meals and cakes, and all dog meals are made using local ingredients. "Since opening, dog villa suites have earned a great reputation, with bookings filling up faster than any other room type," Kaori Uesugi, executive director of the Hiramatsu hotel division, tells VML Intelligence. The suites aim, she says, "to meet affluent guests' expectations for luxury interiors and fine dining when staying with their dogs."

Happy Birth Day
Happy Birth Day

Dog villa suites at the Hiramatsu Karuizawa Miyota

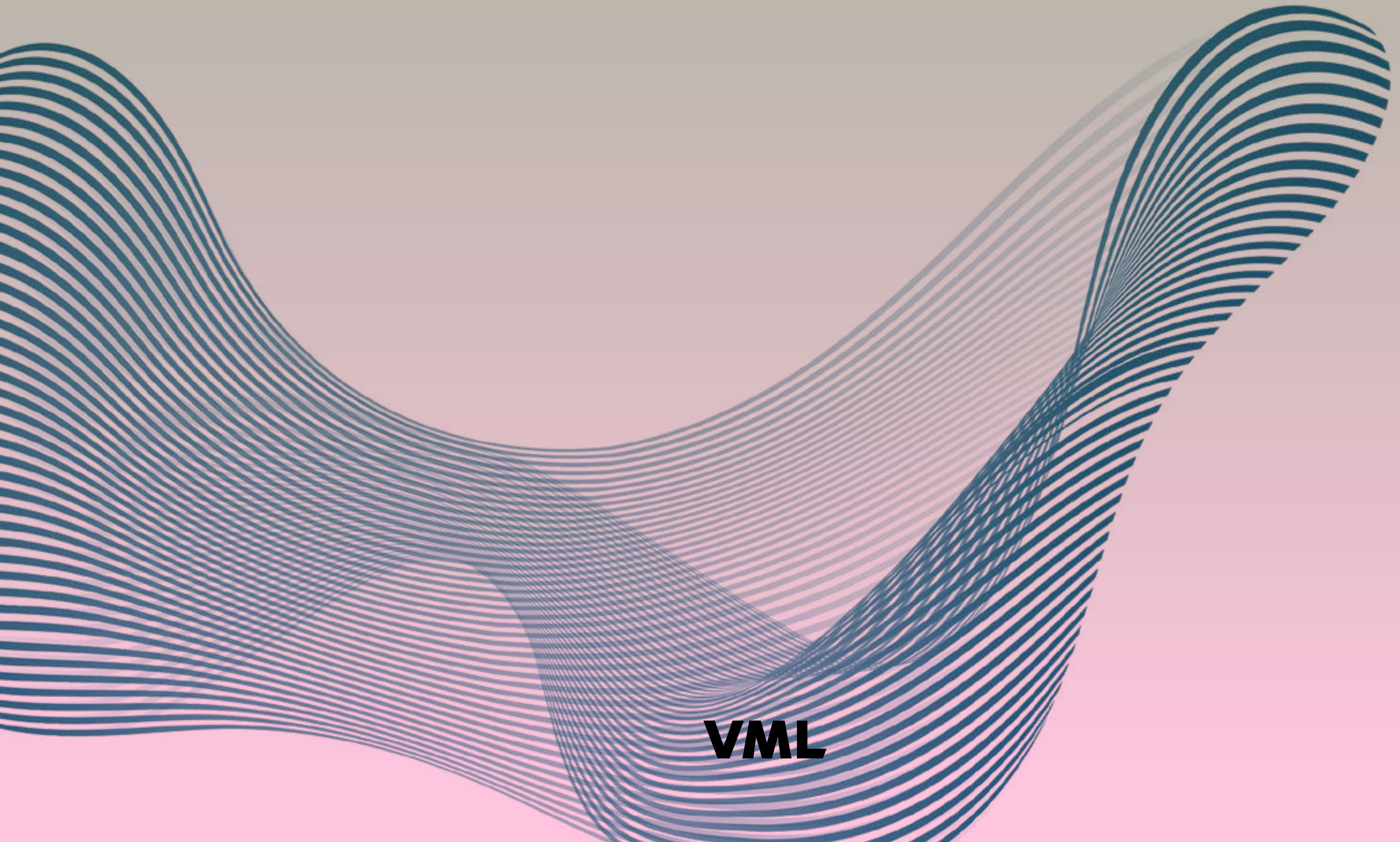
Why it's interesting

The jet-setting pet market is soaring as petrents lovingly and lavishly spend on the best of the best for their fur babies. This is reflected in the $500 billion valuation of the pet industry by 2030, a significant uptick from its $320 billion value in 2023, according to Bloomberg Intelligence.

72

VILLAS REINVENTED

Affluent travelers are looking to luxury villas to raise their game and provide amenities on a par with five-star hotels.



Forest temple, Masu, Not A Hotel Kitakaruizawa

Bedroom, Masu, Not A Hotel Kitakaruizawa

Bath, Masu, Not A Hotel Kitakaruizawa

Villa bookings are often inconsistent across properties—think unreliable wifi, rough towels, and patchy cleaning standards. Companies such as Wander in the United States and Japanese startup Not A Hotel (NAH) are looking to disrupt the market. And opportunity is ripe. McKinsey's "State of Travel and Hospitality 2024" report states that luxury hospitality is the fastest-growing travel segment, with projected 6% growth in 2025.

Wander promises to deliver the "hotelification" of holiday villas. Currently operating in more than 90 locations across the United States, including Malibu and Yosemite, its locations provide uniform, hotel-grade standards that span rigorous cleaning, pool and gym facilities, fast wifi, workstations, and an app with access to a 24/7 concierge to cater to requests including massage bookings or private chefs.

NAH is a Japan-based company that partners with the world's top architectural and design talent including Bjarke Ingels, Nigö, Snøhetta, and Masamichi Katayama to create fully managed and serviced vacation homes in Japan. NAH allows owners to rent out their own properties, and they can stay at other properties in the network.

"This business model came from the insight that most vacation homeowners only use 20 days a year. NAH offers the chance for shared ownership of one-of-a-kind vacation homes for the price proportional to the desired days," says a NAH spokesperson. The company has so far secured $35 million in funding and is projected to generate $368 million in sales in the next two years.

Why it's interesting

The upgrade of the villa rental market is long overdue, due to the wide variation in quality across properties available through traditional rental platforms. Luxury travelers are now seeking a trusted standard of elevated hotel-like experiences from their holiday rentals.

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TRILLIONAIRE DAWN

The era of uber wealth is coming to the fore.

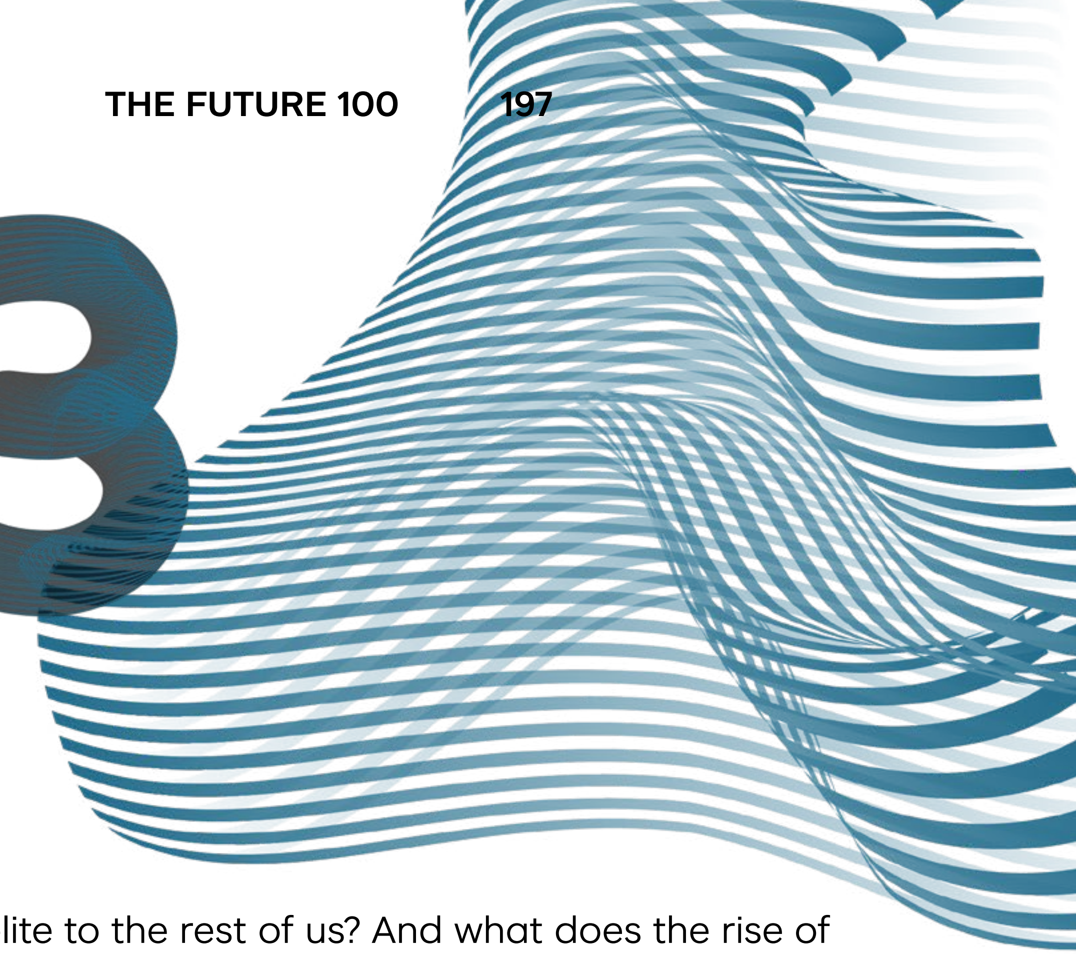
VML

UBS reports there are 58 million US-dollar millionaires in its "Global Wealth Report 2024." And *Forbes* estimates 2,781 billionaires. While there are currently no trillionaires yet, a handful of individuals are expected to reach the net-worth milestone in the next year or so. Right now, Elon Musk is anticipated to become the world's first in 2027, according to Informa Connect Academy.

While a small cadre of people occupy this pinnacle of wealth, a great transfer of assets is underway more broadly. According to Wealth-X, by 2030, $18.3 trillion is projected to be transferred between generations. This shift in funds comes with an array of consequences for how capital is deployed. In response, finance giants are rolling out new tools aimed at the new generation of millennial investors. Expect a lurch toward ESG investments and initiatives that feature a more altruistic thrust. PwC reports that 71% of next-generation family members (read: rich kids) recognize that their family has a responsibility to both fight climate change and tackle its consequences.

> WE MIGHT IMAGINE THAT THESE PEOPLE CAN EXERT THE FULL FORCE OF THEIR WEALTH IN ONE SHOT, BUT THEY CAN'T PUT ALL THAT MONEY IN A SINGLE DIRECTION.
>
> Milton Pedraza, CEO, The Luxury Institute

73



How different are the elite to the rest of us? And what does the rise of the trillionaire class mean for society more generally? Milton Pedraza is CEO of The Luxury Institute, an organization that regularly polls such individuals to gather a realistic snapshot of their attitudes and mores. "Irrespective of the degree of wealth an individual or family has, it's not like that wealth is sitting there in a checking account," he tells VML Intelligence. "That money is spread, invested, and locked in. One billionaire I spoke with once said, 'I've never seen my money, so it's a little abstract in my mind.' We might imagine that these people can exert the full force of their wealth in one shot, but they can't put all that money in a single direction."

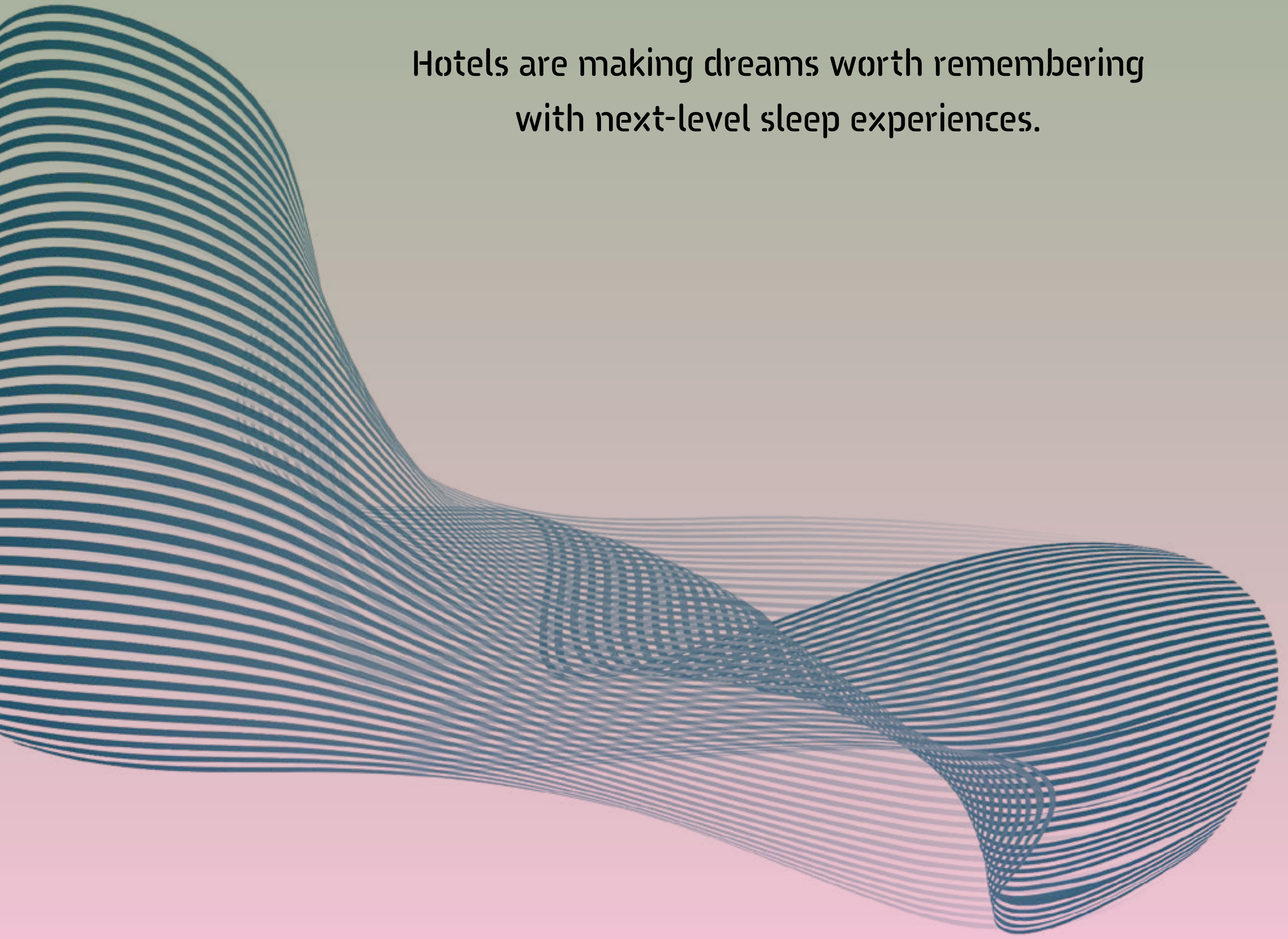
Why it's interesting

Trillionaires represent a new milestone for the ultra wealthy. This group is already exerting a major influence on how less affluent cohorts live. Their decisions and actions have far-reaching political, technological, and societal significance.

74

DREAM TOURISM

Hotels are making dreams worth remembering with next-level sleep experiences.



Dream Portraits by Rocco Forte Hotels at Hotel de la Ville, Rome

Providing guests with the ultimate sleep environment has long been prioritized at hotels, which have used strategies that range from offering dedicated sleep concierges to restful treatments that promote elite sleep. The worth of the current sleep tourism market is estimated at just over $640 billion and is predicted to grow by over $400 billion by 2028, according to HTF Market Intelligence.

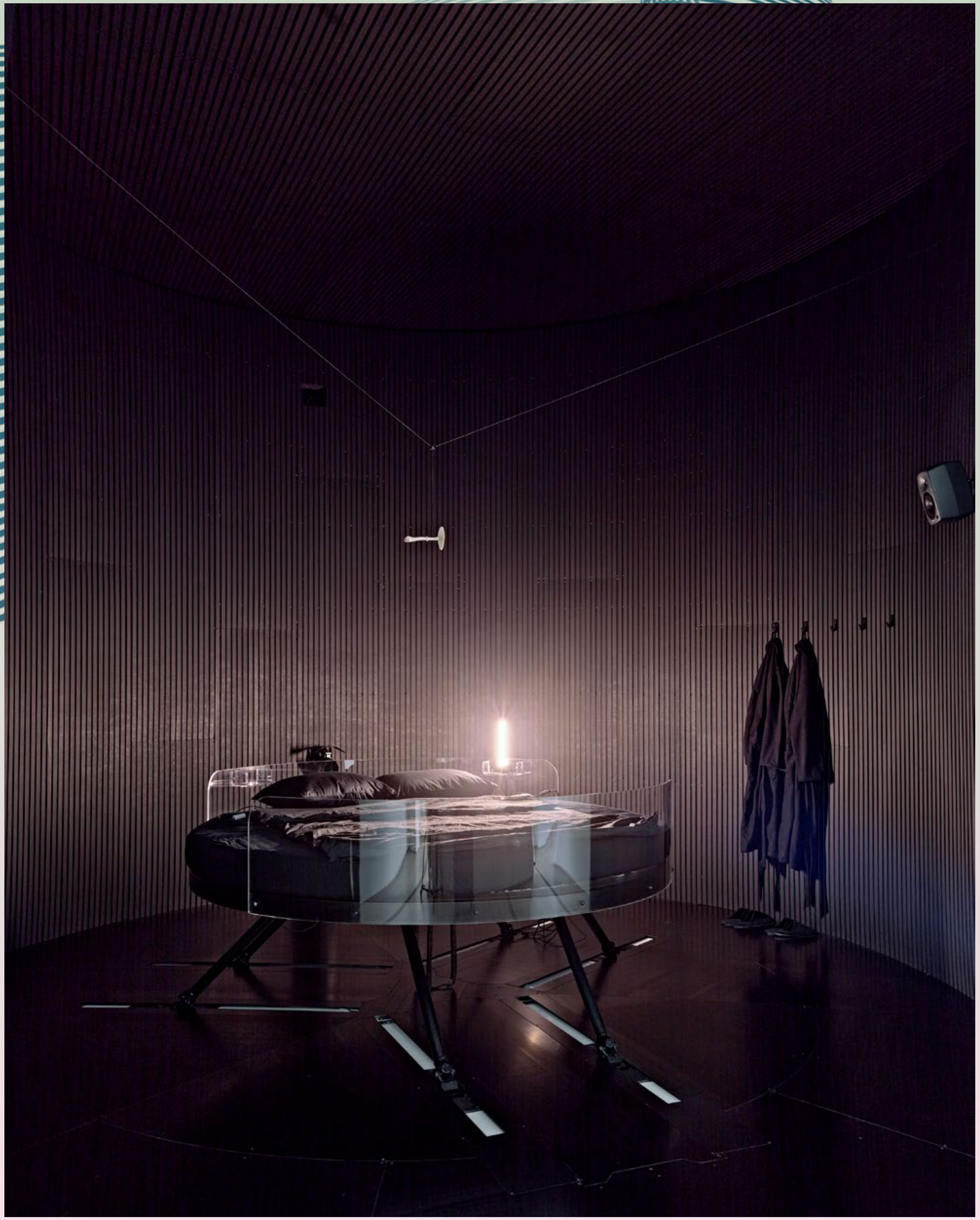
Now hotels are taking a more nuanced approach to sleep by tapping into the rapid-eye-movement stage. Hotel de la Ville in Rome is transforming dreams into works of art in its Dream Portraits offering. Since August 2024, the five-star hotel has allowed guests to opt for a dream recording. An EEG headset is used to monitor brain activity at night and, in collaboration with artist Matteo Nasini, the recording is interpreted into unique porcelain artworks.

The Kimpton Fitzroy London debuted its Room to Dream experience in April 2024, inviting guests into a hypnagogic state during which the subject is aware that they are dreaming, and these lucid dreams can be assessed. Designed in collaboration with lucid dream expert Charlie Morley and AI artist Sam Potter, the experience takes place in a lavender-scented room. Guests are provided with a sleep kit that includes a VR headset featuring a virtual lullaby designed by Potter, a dream journal, a lucid dream guide by Morley, and sleep aids. They also receive their own bespoke digital visualization of their dream to take home. According to the hotel, practicing lucid dreaming "enhances mental health, improves overall wellbeing, and connects with our higher selves."

And at the Fondation Beyeler museum in Switzerland, artist Carsten Höller and scientist Adam Haar Horowitz presented *Dream Hotel Room 1:*

Lab
Tonica
DREAM JOURNAL
KIMPTON FITZROY LONDON

Room to Dream experience at the Kimpton Fitzroy London. Courtesy of Rebecca Hope Photography



Dreaming of Flying with Flying Fly Agarics. Every week between May to August 2024, one visitor had the opportunity to sleep on the artwork. The rotating bed and visual stimulus during waking hours are designed to enhance the dreaming experience by leveraging dream engineering—using technology to tap into the unconscious mind.

According to the Sleep Foundation, people spend on average two hours a night dreaming. Some benefits of lucid dreaming may include wish fulfillment, overcoming fears, and healing. Morley likens lucid dreaming to being in a hypnotherapeutic trance. "Anything that can be treated by hypnotherapy can also be treated by lucid dreaming," he tells VML Intelligence. "Just as a hypnotherapist might plant a beneficial suggestion of healing intent into our unconscious mind, a lucid dreamer might do the same, but due to the even deeper depths to which lucid dreaming takes us, it can work even more powerfully."

Why it's interesting

The rich sleep tourism economy could be expanding with dream tourism, promoting a positive and enriching wellness experience that accesses the subconscious.

Dream Hotel Room 1 at the Fondation Beyeler museum, Switzerland by Carsten Höller and Adam Haar Horowitz.
© Mark Niederman

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LEAN LUXURY

High-end purchases signal a thoughtful, understated, and relaxed approach to luxury.

Courtesy of Loro Piana

"Lean luxury," or smart luxury that chops out all the frills, is impacting the global luxury industry, as economic challenges compress even affluent budgets. More than a third of consumers are cutting back on spending on themselves (38%), even among those on higher incomes (34%). The concept, pioneered by Europe-based Ruby Hotels and Workspaces, has evolved from a hospitality trend into a wider movement, with the shift particularly noticeable in China. As *Jing Daily* reports, the country's gen Z consumers are increasingly embracing a more relaxed, practical style, moving away from the opulence preferred by previous generations.

Wenzhuo Wu, managing editor of *Jing Daily*, tells VML Intelligence that this generation are focused on self-expression and personal satisfaction. Their purchasing decisions are more thoughtful and centered around cost-effectiveness, emphasizing everyday usability, the experience behind consumption, and the community aspects of their choices—eschewing the display of social status through prominent luxury brand symbols, a hallmark of their parents' generation.

The growing appeal of understated, relaxed luxury also aligns with the country's values, as regulators and mainstream social platforms crack down on "wealth flaunting" content. This peaked in May 2024, when the social media accounts of prominent influencers with millions of followers, including Wang Hongquanxing, Baoyu Jiajie, and Bo Gongzi, were removed from the internet. The evolving regulations, coupled with China's economic slowdown, are leading younger luxury consumers to seek smarter ways to maintain their lifestyles at lower cost.

Despite economic challenges, China remains a dominant force in the luxury market. The "Hurun Global Rich List 2024" revealed that China is home to 814 US-dollar billionaires (the highest number in the world, followed by the United States on 800), ensuring its continued role as a key driver of the global luxury industry.

According to a 2024 China luxury market report by Daxue Consulting, two Italian ultra-luxury brands, Brunello Cucinelli and Loro Piana, have excelled in China due to their "premium fabrics and impeccable craftsmanship." Loro Piana, which opened its first store in mainland China in 2007, now boasts 39 locations, with 14 opened since 2021.

Despite LVMH, the world's largest luxury group, which acquired Loro Piana in 2013, reporting a 2% revenue decline for the first nine months of 2024 (with a 4.4% drop in third-quarter revenue), Loro Piana remains one of the few brands showing "solid momentum," thanks to the authenticity and quality of its products, according to LVMH CFO Jean-Jacques Guiony.

In June 2024, Loro Piana launched its first outdoor sports collection, Into the Wild, following the trend of luxury brands offering more practical and functional products, as seen with Loewe and Miu Miu's collaborations with sportswear brands.

> **GEN Z'S PURCHASING DECISIONS ARE MORE THOUGHTFUL AND CENTERED AROUND COST EFFECTIVENESS, EMPHASIZING EVERYDAY USABILITY.**
>
> Wenzhuo Wu, managing editor, *Jing Daily*

Why it's interesting

The trend toward "lean luxury" is set to reshape the landscape of high-end retail, particularly in markets such as China. This shift reflects a broader cultural movement prioritizing practicality and durability over ostentatious displays of wealth, with younger consumers leading the charge. Brands that adapt to these changing values by emphasizing quality, authenticity, and thoughtful design are poised to thrive in the evolving luxury market.

Courtesy of Loro Piana

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ELEVATED PARKING

Luxury garages take center stage as proud car owners elevate them to showroom standard.

Traditional garages and parking spaces are no longer sufficient for the super-rich. Just as they demand elevated experiences in other areas of their lives, they now seek bespoke, luxury parking solutions. Graham Harris, founding partner and managing director at SHH Architecture and Interior Design in London, which specializes in designing private residences for the wealthy, explains to VML Intelligence that the days of garages being simple concrete bunkers are over. Today's garages are evolving to accommodate not only expanding car collections but also additional spaces.

Harris showcased a recent design for a 16-car garage, which can be viewed through a large window that frosts at the touch of a button. The garage features a resin floor, central turntable, and high-gloss black ceiling designed to reflect the cars below. Adjacent to the garage is the client's study, slightly elevated for a prime view of the collection. "We call them gallery spaces rather than garages," says Harris.

The trend is also prevalent in the APAC region. Xing Li, publisher and editor-in-chief of *Robb Report China*, tells VML Intelligence that garages have become integral to luxury homes. She notes a shift toward incorporating cars into the living space, making them a part of the mansion's interior design rather than relegated to a separate area.

Harris also highlights a shift in material choices for garages. "Today, it's all about creating dramatic backdrops." One popular feature is Samsung's The Wall LED display, customizable in size and starting at $385,000, which creates an immersive, visually stunning backdrop in the garage.

Garage at a private residence in London. Courtesy of SHH Architecture & Interior Design

Traditional concrete floors have also been replaced by hand-poured resin, available in any color. This material protects car tires and resists dirt and oil. Recessed lighting integrated into the floors makes the cars look as though they are floating.

Why it's interesting

As Li concludes, "For high-net-worth individuals, the pursuit is not just high-end luxury, but also personalization and privacy." These trends in garage design reflect the growing desire among the wealthy for unique, private, and personalized living spaces, where even their car collections are part of the luxury experience.

> "THE DAYS OF GARAGES BEING SIMPLE CONCRETE BUNKERS ARE OVER. TODAY'S GARAGES ARE EVOLVING TO ACCOMMODATE NOT ONLY EXPANDING CAR COLLECTIONS BUT ALSO ADDITIONAL SPACES.

Graham Harris, founding partner and managing director, SHH Architecture and Interior Design

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GODLIKE JOURNEYS

Families are vacationing with main-character energy, starring in their own luxury narratives.

VML

Temple of Apollo at Delphi, available as part of Take Me on a Story (Hercules), by Black Tomato

From channeling herculean strength to taking on daring missions, travel operators are crafting epic and cinematic family vacation itineraries to sate adventurous children, who are increasingly influencing the planning process (see Gen alpha vacations, page 92). Over half of high-income parents (51%) say they are spending more on their children.

Luxury tour operator Black Tomato is inviting families to follow in the footsteps of the gods in its new family-friendly itinerary, Hercules. The eight-night “epic pilgrimage” is the latest addition to the brand’s Take Me on a Story collection, which invites travelers to explore the world through the lens of classic stories. Inspired by the legendary 12 labors, travelers will channel their inner Hercules, “battling mythical creatures, navigating

secret labyrinths, and crossing siren-filled seas." And much like the hero himself, those who complete the quest stand to gain valuable life skills, as cofounder Tom Marchant explained to *Robb Report*. "Hercules teaches timeless lessons around courage, perseverance, and humility—values that I wish to instill upon my daughters."

Experiential travel specialist Pelorus has launched The Norway Assignment: Your Mission Awaits for 2025. Inspired by the upcoming release in the *Mission: Impossible* franchise, the experience invites travelers to step into Ethan Hunt's shoes in an action-packed journey through awe-inspiring Norwegian landscapes. Briefed by their own "mission expert" (an ex-special forces officer), participants will race supercars, ride speedboats and helicopters, and learn to master action sequences under the guidance of stunt professionals. Despite the high-octane nature of the itinerary, the experience can be tailored for families seeking adventure.

The Norway Assignment: Your Mission Awaits, inspired by Mission Impossible, by Pelorus

Aurelia van Lynden, head of travel at Pelorus, tells VML Intelligence that families "are keen to build in excitement and adventure, and are leaning into the holiday experience, ensuring that they are having an in-depth, authentic, and engaging holiday." She also notes the growth on one-to-one travel, where a parent and child might plan a holiday focused on shared passions to enjoy uninterrupted time together. "This could be focused on a particular interest such as marine biology, or folklore, or even a dining trend they have seen on social," she says.

Taking a cerebral approach, luxury travel designer Brown and Hudson is offering to school the next generation of changemakers in

Meta:Morphosis: Lessons in Leadership in the Cradle of Democracy. Over eight days, families experience the historic wonders of Athens and the Peloponnese, while learning about the values of authentic modern leadership from a series of inspiring mentors, including a Paralympian athlete, a politician, a fashion designer, and a Michelin-starred chef.

UK luxury travel operator Kuoni has noted an uptick in what it calls more “complex” trips during school holidays. Managing director Mark Duguid told the ABTA annual travel convention: “We’re seeing innovation like never before in the family travel market.” Kuok Hui Kwong, the chair of luxury hotel operator Shangri-La, notes the same trend in Asia, saying in a May 2024 interview with McKinsey that “a new generation of [Chinese] luxury consumers wants to share experiences and quality moments with their families.”

Why it’s interesting

Epic journeys and complex itineraries that offer learning, discovery, adventure, and self-actualization were once the preserve of the 1%. Now they are on the calendar for affluent families as parents seek to educate and entertain kids on vacation.

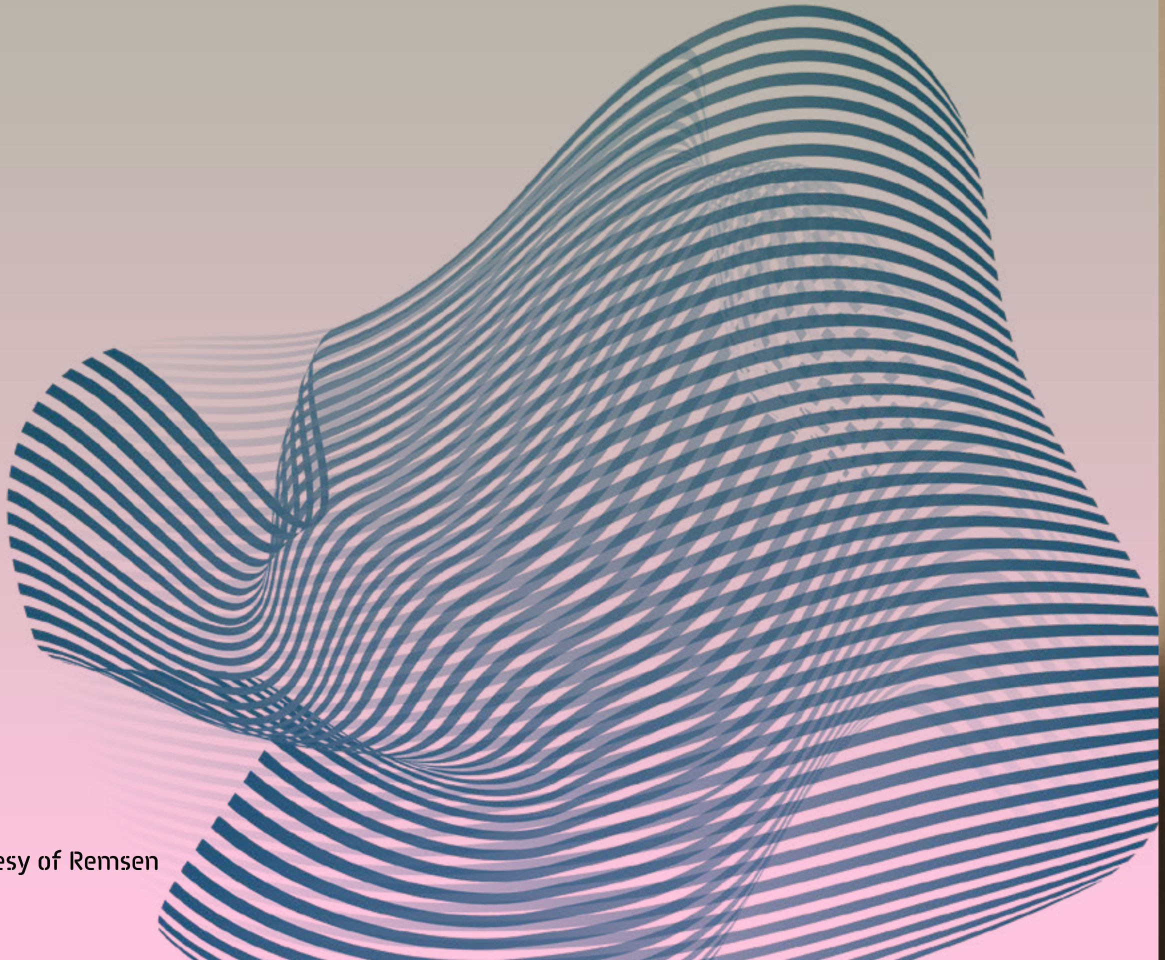
The Norway Assignment: Your Mission Awaits, inspired by Mission Impossible, by Pelorus

LUXURY

78

AGE-CONSCIOUS DESIGN

Designers and architects are taking a luxury lens on aging.



Grab bar by Remsen. Courtesy of Remsen

Older luxurians are getting a glow-up. Designers are creating products and spaces with age in mind, but that carry none of the cues associated with disability or illness. In fact, 62% of people aged 80 and over believe that being older is aspirational. Thanks to this shift, aging isn't what it used to be, and baby boomers have emerged as the wealthiest generation in history. In the United States, they account for 20% of the population and own 52% of its net wealth ($76 trillion), according to the Federal Reserve.

The picture is similar in most advanced economies, and brands are emerging that cater to this generation. Lifestyle brand Remsen was founded by New York architects Sam Zeif and Spencer Fried in 2024. It promises "timeless objects that redefine aging. Because great design knows no age." Products include a holder for playing cards, an elegant silver pill box, and grab bars for bathrooms that feature a tactile grip.

The model of senior living is also being rethought. While retirement homes were once centered around health and care, now more emphasis is being put on community, longevity, and lifestyle. Located in Buda, Texas, Kindred Uncommon includes green spaces and a layout that prioritizes conviviality. A similar approach has been employed for Cobham Bowers, a later-living community in Surrey. Designed by Coffey Architects, it aims to foster a "seamless blend between personal and communal living."

During the Consumer Electronics Show 2025, there were plenty of tech solutions to address the issues that come with aging, such as Ageless Innovation's age-inclusive games (due to launch in March 2025) and companion care robot Lemmy. An interesting development that Consumer Technology Association (CTA) futurist Brian Comiskey identifies

Cane by Remsen. Courtesy of Remsen

is the “blurring line between smart home and age tech.” A recent CTA survey revealed that 80% of US consumers consider smart home tech as age tech.

A founding member of award-winning architecture practice Assemble, Anthony Engi Meacock believes that age-conscious design is best when it is hard to notice. “It should feel intrinsic about the design rather than added on,” he tells VML Intelligence. “We have a long history of not thinking about marginalized groups, and most office chairs are designed for the average man. Demographic shifts are making design around the elderly and aging important. Proportionally, more people are living with more health issues—the population has shifted so there’s more complications.” When it comes to designing for this generation, “the most critical thing is that the design is invisible,” he adds.

Pill container by Remsen. Courtesy of Remsen

> **[WHEN IT COMES TO DESIGNING FOR THIS GENERATION] THE MOST CRITICAL THING IS THAT THE DESIGN IS INVISIBLE.**
>
> Anthony Engi Meacock, founding member, Assemble

Why it’s interesting

The new aged generation have tastes and expectations that are markedly different from their own elders. Lifestyle aspirations don’t cease when an individual lives beyond the age of 70. Brands should take note: this generation are still the ones with most of the wealth (see Aspirational aging, page 99).

79

MENULESS FINE DINING

Restaurants are inviting diners to surrender to the chef's vision.

Rather than meticulously listing dishes and prices online, select restaurants allow diners to experience meals on the chef's terms, with limited or no information prior to arrival.

This model of dining, which reflects the intimacy and immediacy of high-end omakase, is being pioneered within traditional Chinese fine dining at restaurants such as Shanghai's Tou Zao and Cong Jiang Suan. Du Shi, the mastermind behind the two establishments, prefers the term "Chinese cuisine by the bar counter" or "chef-led Chinese." He tells VML Intelligence that instead of following a set cuisine or a predictable menu, the restaurants offer an experience that is at once rooted in tradition and thrillingly modern. Diners are invited to surrender control, entrusting the chefs to take them on a journey that explores both the familiar and the avant-garde within Chinese culinary techniques.

Dishes are crafted and delivered by the chefs at a bar counter, breaking with conventional sit-down service. This direct interaction between chef and diner allows for an exchange beyond words: every dish is a reflection of the chef's skill, while also taking into account each guest's preferences and immediate feedback. This approach is also particularly suited to Chinese cuisine, where timing and temperature are critical to delivering the best flavor.

Both Tou Zao and Cong Jiang Suan have experienced overwhelming demand, even as they shun the conventional comforts of detailed menus and dining hall seating. Tou Zao, which opened in 2022, operates at a 2,200 RMB ($303) per-person minimum, while Cong Jiang Suan, opened in late 2024, has made monthly price increases despite doing little PR or advertising. This shift reflects a growing appetite among China's high-end diners for immersive, narrative-driven dining focused on experience over predictability, says Du Shi.

Opened in 2023, popular Chicago eatery Warlord was added to the Michelin Guide in 2024 and is known for its minimalistic approach to online presence, providing only an address and hours of operation. Diners enjoy an unexpected culinary journey during their meal, centered around preservation and live fire. They must let go of familiar reference points, allowing themselves to be surprised by whatever seasonal ingredients and culinary techniques the chefs have prepared that day. As co-owner John Lupton explains, every meal is based on "à la minute cooking," adapting dishes on the spot, based on guest preferences and dietary needs. This personalization within an undefined framework reflects a key shift: chefs are prepared to accommodate but ultimately guide the dining journey.

Stir Crazy, a wine-focused venue in Los Angeles launched in May 2023, embraces this philosophy, stating that diners should come open-minded rather than arrive with preconceived expectations. Co-owner Mackenzie Hoffman believes that providing less detail heightens the experience: "Our low-information strategy encourages guests to connect more immediately and meaningfully with their environment."

Why it's interesting

For a generation seeking unique, visceral experiences, the allure of the unknown—intentionally stepping into uncharted culinary territory—speaks volumes. These restaurants cater to diners craving surprise, and offer a refreshing unpredictability that rekindles the romance of dining out.

Cong Jiang Suan restaurant, Shanghai

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AFFORDABLE AFFLUENCE

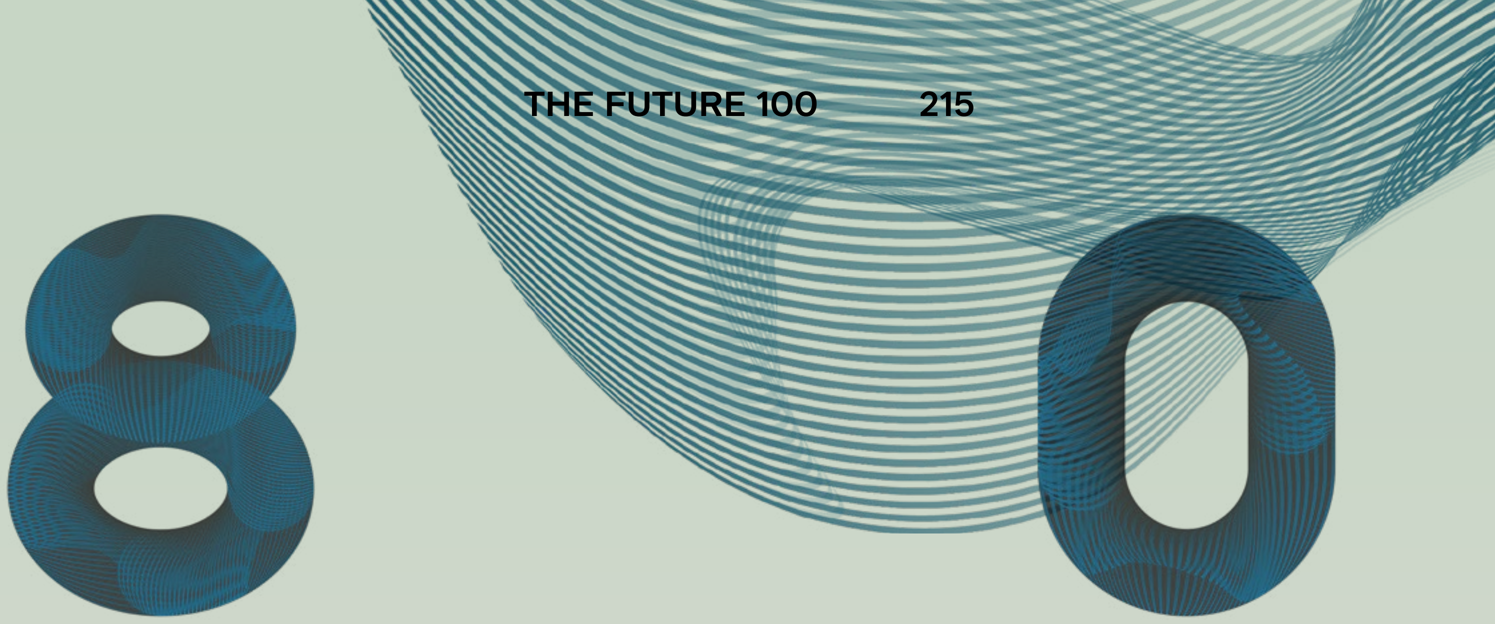
Undeterred by tight budgets, cost-conscious consumers are splurging on everyday products.

Poppi collaboration with Post Malone, courtesy of Poppi

Poppi x Lakers, courtesy of Poppi. Courtesy of Hayden Sahli

VML Intelligence data shows that the cost of living remains the top concern for global consumers. This ongoing reality is confirmed by McKinsey's "The State of Grocery Retail Europe 2024" report, which finds that cost is the top consideration for shoppers pre-purchase, as 74% of Europeans and 76% of Americans are trading down to own-brand products.

In parallel to this extended period of consumer frugality, however, we have ushered in a new era of the lipstick effect, where cost-conscious shoppers watch their pennies most of the time so they can spend big on the little treats that really matter to them. While cost cutting is top of mind for many, 70% of global gen Zers are either maintaining or spending more on themselves, 34% are increasing spending on small treats, and 49% are spending more on food and groceries. Bank of America's "Value shop til you drop" report confirms that a higher percentage of gen Z shop at premium grocery stores than any other generation.



For gen Z, the products worth splurging on are those that align with their identity, values, sense of style, and health-conscious lifestyle. In this sense, the functional and eye-catching $19 smoothies from premium Los Angeles grocery chain Erewhon or Olipop and Poppi's prebiotic sodas become status symbols worth paying for. In Singapore, The Flower Mulan bubble tea store opened in September 2024, offering drinks blended with traditional Chinese medicine ingredients. Customers can choose from healthy toppings such as snow fungus and peach gum. Food blogger Andrea Hernández, author of the *Snaxshot* newsletter, told *Business Insider*: "It's a form of affordable affluence. We're now getting into this phenomenon of food not as a basic need but as a luxury experience."

Why it's interesting

The hollowing out of the middle market continues at pace. In the face of the save-and-splurge mentality of consumers, brands have an opportunity to provide premium products for those willing to splash out on functional and affordable treats for themselves.

81

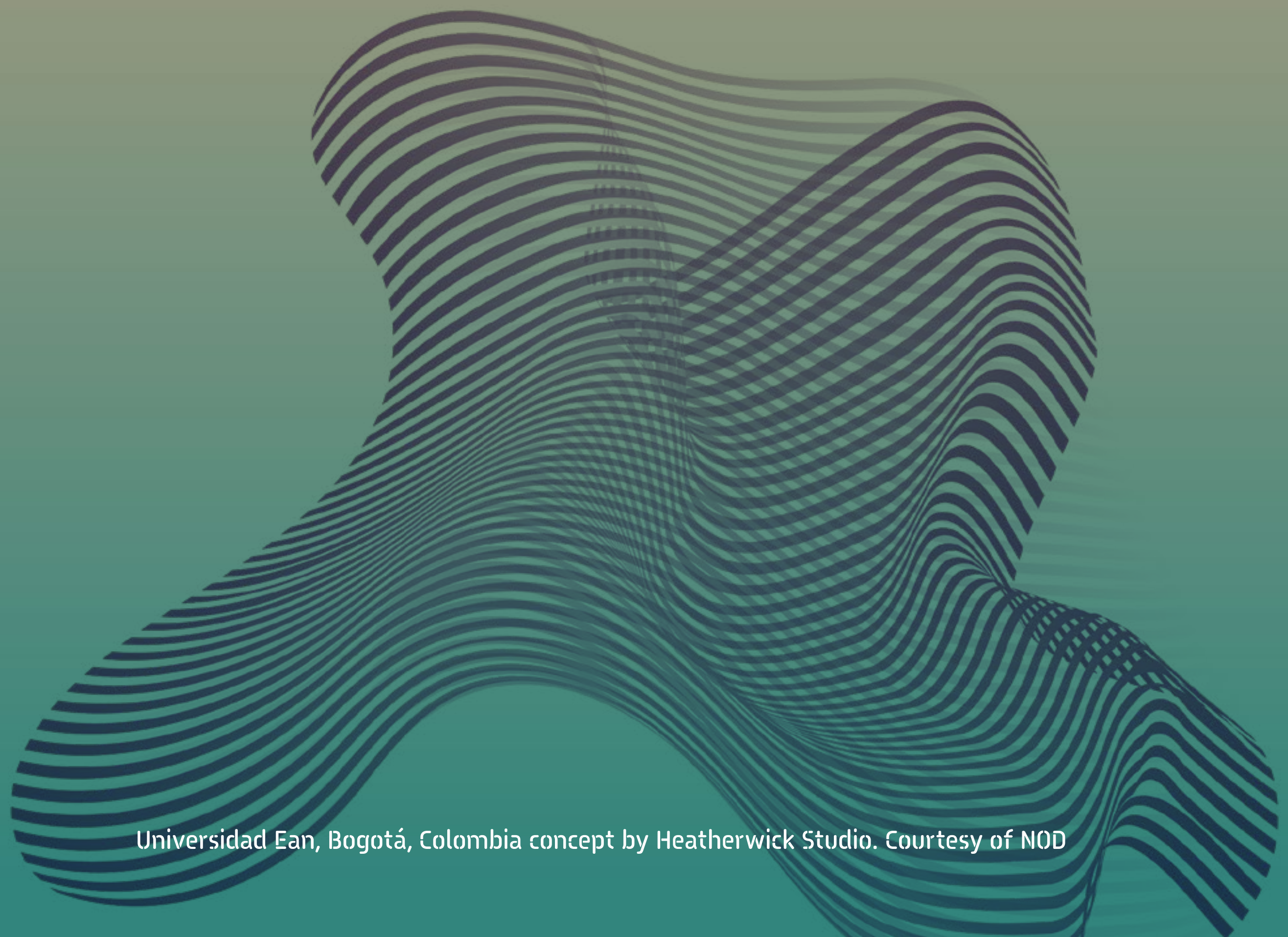
HEALTH & WELLNESS

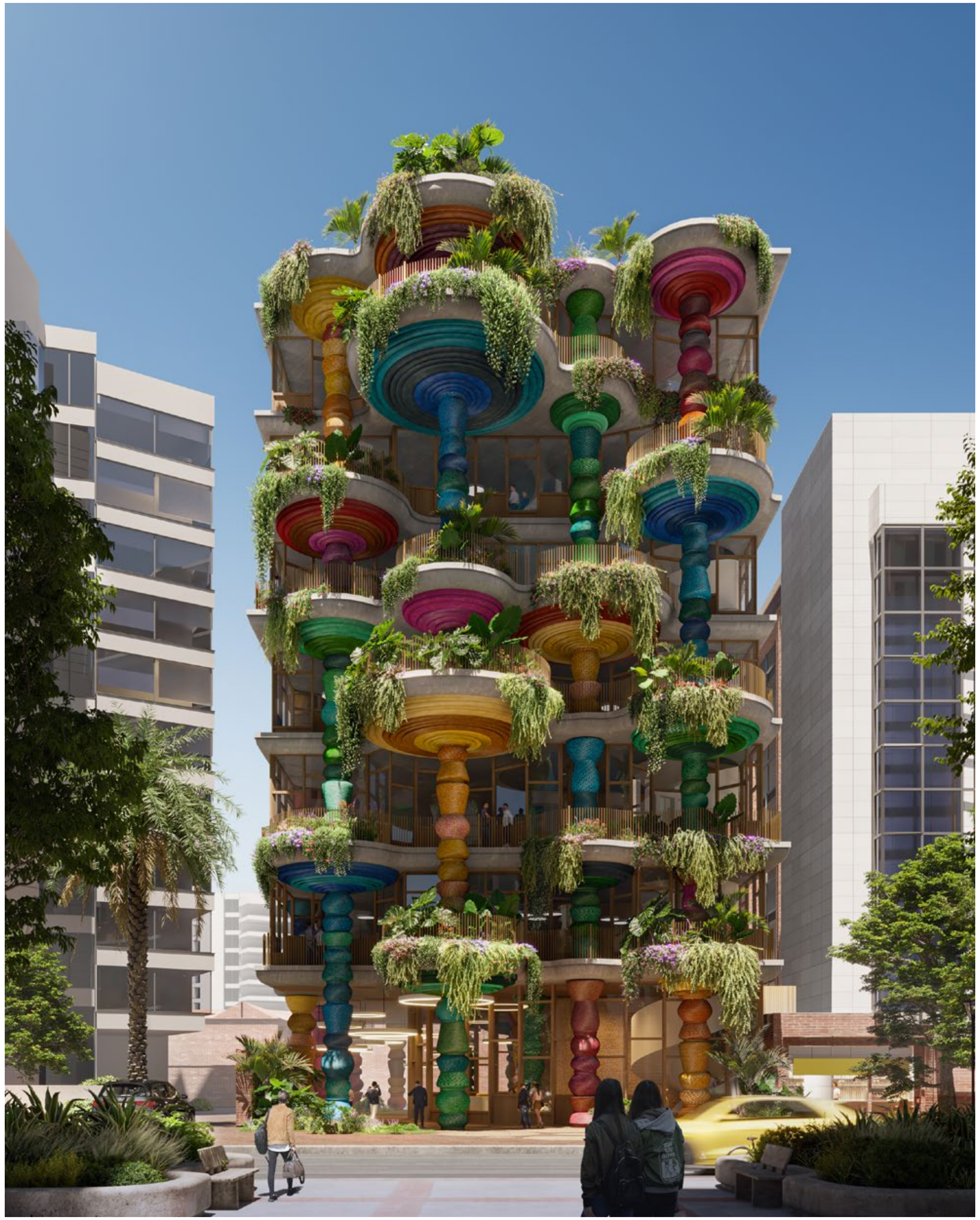
90

81

JOYFUL ARCHITECTURE

The idea of architecture that uplifts is taking hold.





Universidad Ean, Bogotá, Colombia concept by Heatherwick Studio. Courtesy of NOD

Ditching "boring" buildings for emotionally engaging and meaningful ones is a new idea being championed by architectural practices. The chief proponent of this concept is Thomas Heatherwick, creator of the Humanise campaign, which the architect says is about making cities "more joyful and engaging through the design of buildings."

The Humanise campaign has partnered with the United Kingdom's Loughborough University to design content for a new MA program in Architecture & Design, which will launch in fall 2025. Abigail Scott Paul, global head of the Humanise movement, tells VML Intelligence that the campaign collaborated with the university to "develop an approach that could boost understanding of human needs when it comes to building design and the role of visual complexity, as well as train up a new generation of architects who can bring Humanise principles to life." Scott Paul adds that the campaign "is about sensitizing people, including those responsible for designing and commissioning buildings, to the negative impacts of boring buildings on our health and wellbeing," noting that "studies are beginning to show that being surrounded by boring buildings that lack visual complexity increases cortisol levels, causing higher levels of stress."

Among Heatherwick Studio's buildings that espouse this vision of a more "human" architecture is its project for a design school and makers' space that will be part of Universidad Ean in Bogotá, Colombia. Imagined as a riot of colorful columns, dotted with balconies spilling an abundance of lush plants, the design spotlights details inspired by werregue basketry, a craft practiced by Colombia's indigenous Wounaan community. Works are due to begin on the project in 2025.

Swiss Pavilion, Expo 25, Osaka

Also exemplifying this joyful mood are several of the pavilions created by participating countries, set to be exhibited at Expo 2025 in Osaka, Japan. Saudi Arabia's pavilion, inspired by the country's traditional urban structures, is intended to echo "the exploration of towns and cities throughout the kingdom," and to capture the country's "deep traditions." Switzerland's pavilion, a series of interconnected, orb-like structures crisscrossed with greenery, sets out to evoke a "magical atmosphere." Rather than being overtly grandiose, these pavilions are described as conjuring a more personal and profound experience.

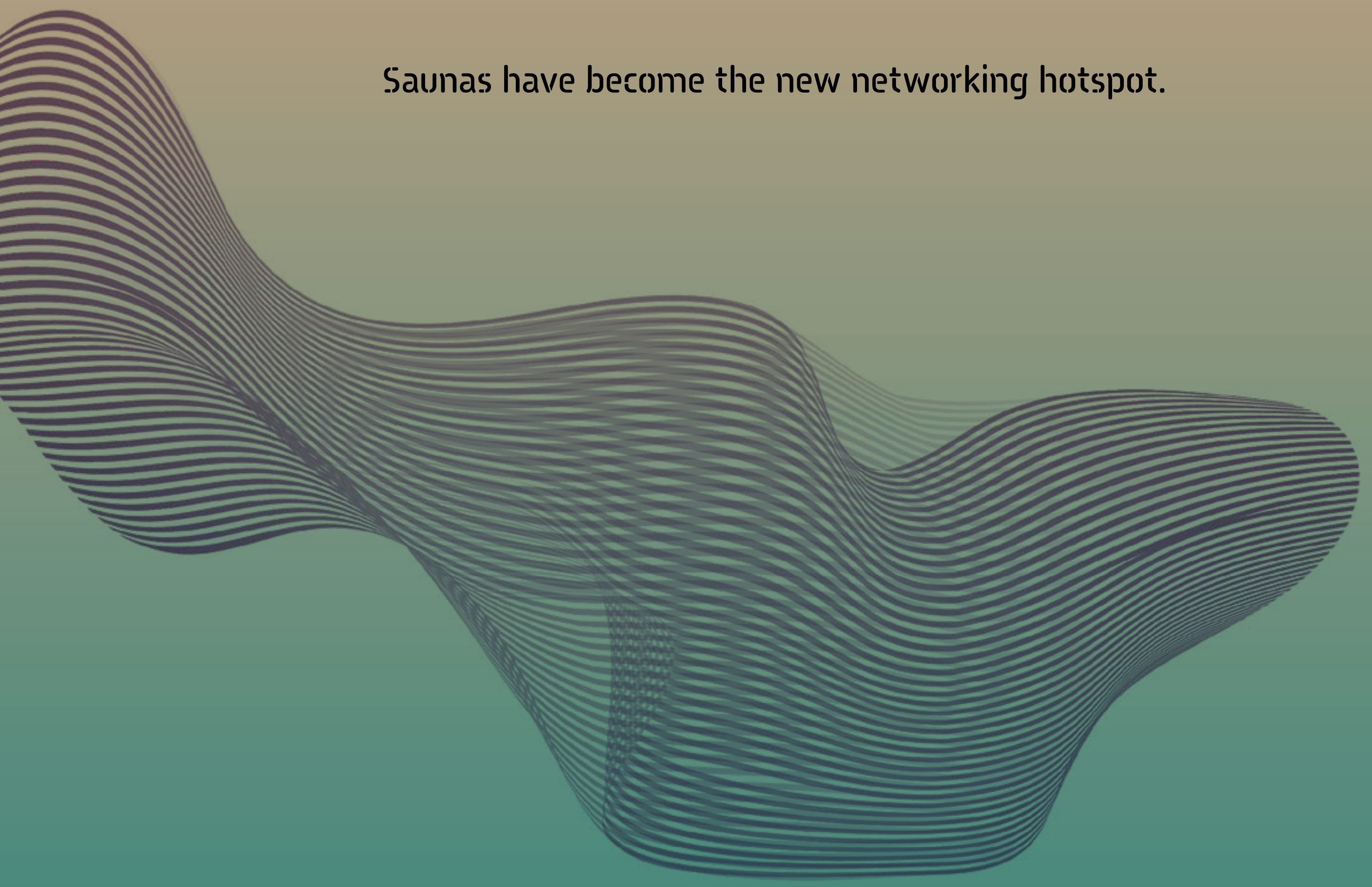
Why it's interesting

A movement toward truly idiosyncratic, human-centered architecture with a personality of its own aims to elicit a positive and uplifting response. People are on a mission to engage their senses and want buildings they visit to spark positive emotions.

82

SOCIAL SAUNAS

Saunas have become the new networking hotspot.



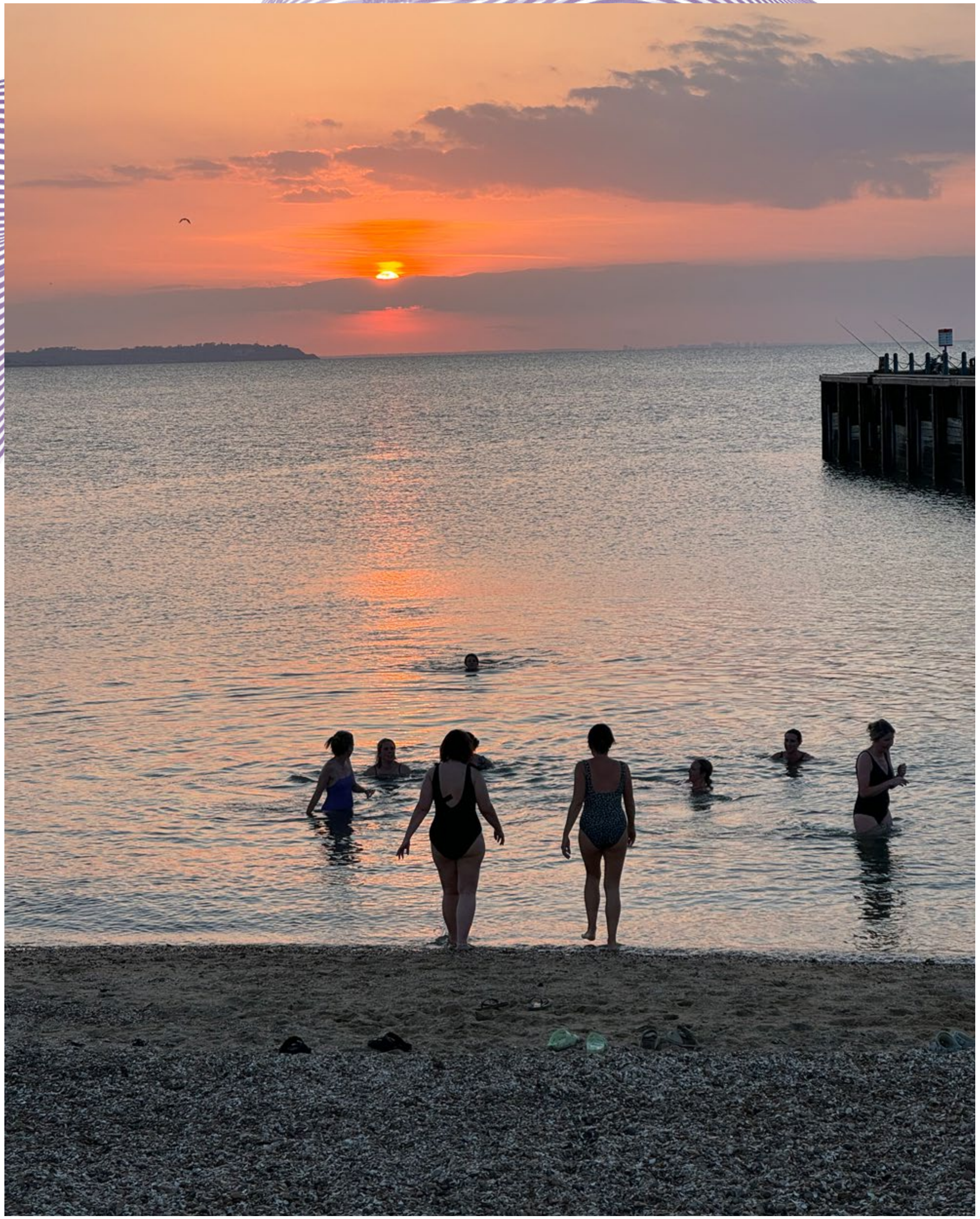
As well as being a destination promoting health benefits, saunas are now becoming places for social gatherings. The *Wall Street Journal* refers to the sauna as “the new place for investors and founders to socialize and raise money” in a November 2024 titled “Want to network in Silicon Valley? Bring a bathing suit.” Sauna culture is becoming established in locations around the world and modernizing for urbanites wanting to pair a trip to the bathhouse with socializing.

In San Francisco, the Alchemy Springs communal bathhouse opened in fall 2024, hosting events including “connection hour” during a date week hosted in November and a Banya & Beats wellness party involving saunas, live music, and more in September. The design of the bathhouse is intended to encourage meaningful human connections.

In the United Kingdom, sauna hubs are drawing people in coastal destinations and cities alike. In London, Community Sauna Baths operates saunas in Hackney, Stratford, and Bermondsey, with events such as life-drawing classes, sauna sound baths, and “saunesthesia,” which the company describes as a “multi-sensory experience in which temperature, sound, and scent synchronize in a hifi-equipped blackout sauna.”

“The sauna provides a similar function to alcohol in a way,” Charlie Duckworth, a director at Community Sauna Baths told the *Guardian*. “It lowers inhibition. It makes you feel comfortable and chatty, and hopefully in a place that’s social and friendly. But not in a sexualized or intoxicating way.”

Sea Scrub Sauna hosts saunas in the UK coastal towns of Margate and Whitstable, where guests can immerse themselves in the cold sea to cool



Sea swimming, Whitstable, with Sea Scrub Sauna

off afterwards. "Everyone who arrives leaves calmer and happier, and reset," Sea Scrub Sauna's cofounder Robin Bartlett tells VML Intelligence. "Emotionally and mentally, it's a real wind-down, but also gives you a re-energizing feeling."

In New York, Othership, which describes itself as offering "social self-care in the city," opened in the Flatiron district in July 2024, adding to its locations in Canada. Its experiences include Evening Social sauna sessions, which offer a space for guests to "shift our state and build belonging."

Why it's interesting

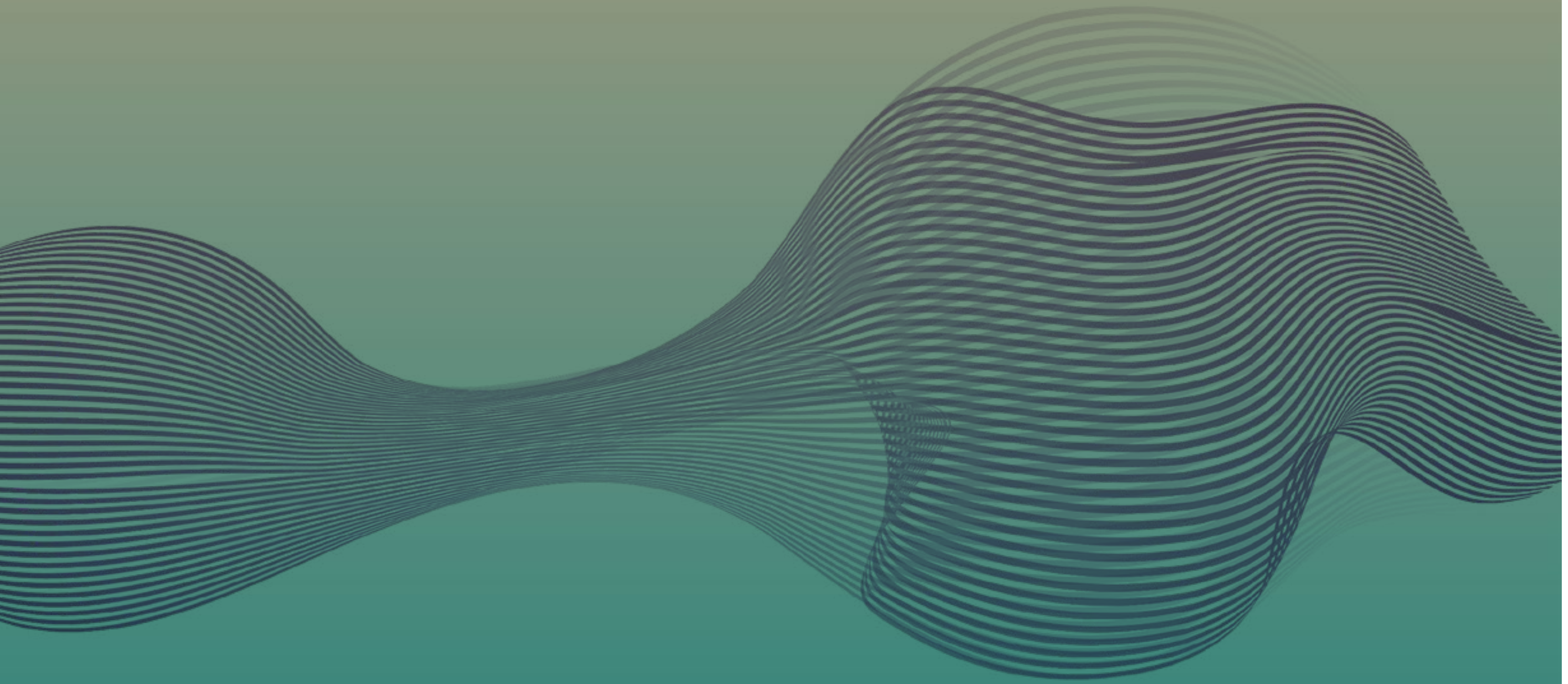
A study carried out by the UC San Francisco Osher Center for Integrative Health has linked whole-body hyperthermia—raising body temperature above normal—to a reduction in depressive symptoms. Communal saunas, with their focus on connection combined with heat therapy, could prove a useful wellbeing tool.

Margate sauna, Sea Scrub Sauna

83

SOMATIC WELLNESS

Practitioners are counseling that tuning into the body can calm the mind—and brands are beginning to tap into this wisdom, too.



Courtesy of Elina Fairytale via Pexels

As digital devices have evolved to tell us more about our bodies than ever before, there's a sense that this can be at the expense of reading the signals from one's own body. Tapping into the opposite of this idea is somatic wellness, with its focus on paying attention to how the body expresses emotions, experiences, thoughts, and feelings. This chimes with the global sentiment that 46% of people say when it comes to their health and wellbeing they are listening to their body more.

With nearly 22,000 posts for #somatictherapy on TikTok and over 200,000 on Instagram as of January 2025, the movement is taking hold. Jennifer Mann, a mind-body practitioner, writes on Instagram: "the feelings you avoid are translated into the thoughts that keep you stuck. So if you can become more comfortable in feeling the experience in your body, your mind becomes a safer place too."

Another practitioner popularizing somatic wellness is Nahid de Belgeonne, author of 2024's *Soothe: The book your nervous system has been longing for*, which explores how to bring the body back into balance via movement and breath. De Belgeonne tells VML Intelligence that she believes people are turning to somatic wellness and therapies as "we've sort of tried everything, and it's not working." Key to de Belgeonne's method is the idea of interoception, which she describes as "listening to [the] signals… coming from your body to the brain." She advocates introducing "micro practices" throughout the day to reduce stress and adds that in today's always-on climate of continuous information "the world has changed. And we have to be the gatekeepers of our nervous system."

Fitness app Asana Rebel offers somatic yoga, which focuses on the mind-body connection and deep-tissue awareness. Pilates is also integrating somatic practices. London's East of Eden pilates instructor Tara Lee Oakley told *Marie Claire* in an October 2024 article that "somatic pilates is a slower-paced pilates practice that encourages focusing on the internal experience of the movements, rather than the external appearance of the end result of the movement."

Brands too are drawing on the language of somatics to underline how they can nurture every aspect of the self. In mid-2024, French skincare brand Sisley launched Neuraé, a line created around the belief that "recurring emotions impact our facial features." And in the United States, integrative dermatologist Dr Keira Barr promotes what she calls a "somatic approach to skincare."

Why it's interesting

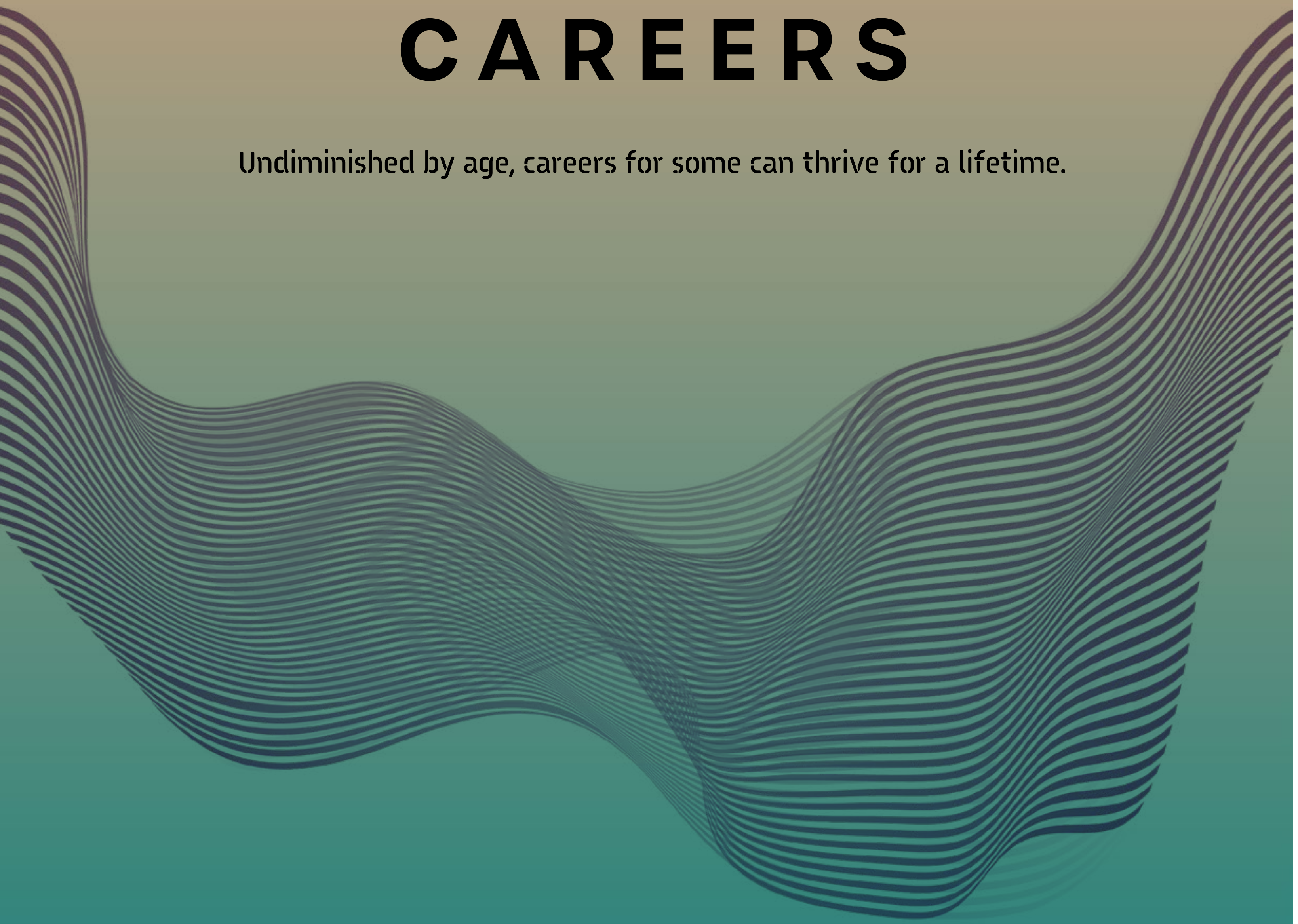
Consumers who crave analog pursuits (see The analog movement, page 36) and want Digital simplicity (page 44) are also drawn to somatic wellness. Brands are well-placed to help elevate more mindful and intuitive health practices.

Courtesy of Nahid de Belgeonne

84

LONGLIFE CAREERS

Undiminished by age, careers for some can thrive for a lifetime.



project#1
MARTHA STEWART
M
Marine
Wellness Collagen
15g of collagen per serving / Supports skin, hair, and nail growth
Promotes quality sleep and bone strength / 25 servings
LEMON / Natural flavors
DIETARY SUPPLEMENT
NET WT 15.27 OZ (0.96LBS) 432.5G

Marine Wellness Collagen, Martha Stewart Wellness

The average lifespan is increasing. The World Health Organization expects one in six people to be aged 60 or over by 2030, a demographic group with a predicted total of 2.1 billion people. This is driving the growth of an older workforce. According to a 2023 Pew Research Center report, 19% of people aged 65 years and older are employed. The report also revealed that workers aged 75 and upwards are the fastest-growing age group in the workforce, a group that has more than quadrupled in size since 1964.

“If we’re going to live to 100, we’re probably not going to stop working at the classic time of 60 or 65,” Bill Kole, author of *The Big 100: the New World* *of Super Aging*, tells VML Intelligence. Kole acknowledges some jobs may be difficult to carry out in older age, but mentions two examples of people thriving in later decades. Sprinter Julia “Hurricane” Hawkins, who lived to 108 years old and died in October 2024, started competitive running in her 90s; and primatologist Jane Goodall, born in 1934, told Kole that she is working harder now than she ever has in her entire career.

Eighty-one percent of people agree that a career that you love can last a lifetime and 79% say that work offers a valuable sense of purpose in life. Well-known individuals who exemplify this include 98-year-old biologist Sir David Attenborough. He recently worked on *Secret World of Sound*, a three-part nature series which aired in 2024 and is currently working on *David Attenborough: Ocean*, slated for release in 2025.

A strong work ethic and zero desire to retire are also evident in chef Ruth Rogers, owner of the River Cafe in London, who told the *Standard* in June 2024, “Retire, me? No, no, no—I’ll die at the stove.” The 75-year-old had just opened a sister outlet to the River Café, adjacent to the original. Italian fashion designer and billionaire Giorgio Armani turned 90 in July 2024, telling the *Financial Times*, “everyone tells me I should just retire and enjoy the fruits of what I’ve built, but I say no… absolutely not.”

In April 2024, the *New York Times* started a new series, “The Unstoppables,” profiling “people whose ambition is undimmed by time.” Interviewees include 82-year-old Martha Stewart, who does indeed appear to be unstoppable as she continues to expand her brands, including Martha Stewart Wellness. In October 2024, Netflix released a documentary about the self-made female billionaire, titled *Martha*, and deems her the “original influencer.”

> **IF WE’RE GOING TO LIVE TO 100, WE’RE PROBABLY NOT GOING TO STOP WORKING AT THE CLASSIC TIME OF 60 OR 65.**
>
> Bill Kole, author

Kole observes that as people live longer, they will be working longer too. He suggests that this could mean retraining to align with new jobs or technologies. By 2050, he believes “midlife could be 60s” and that “100 is the new 80.”

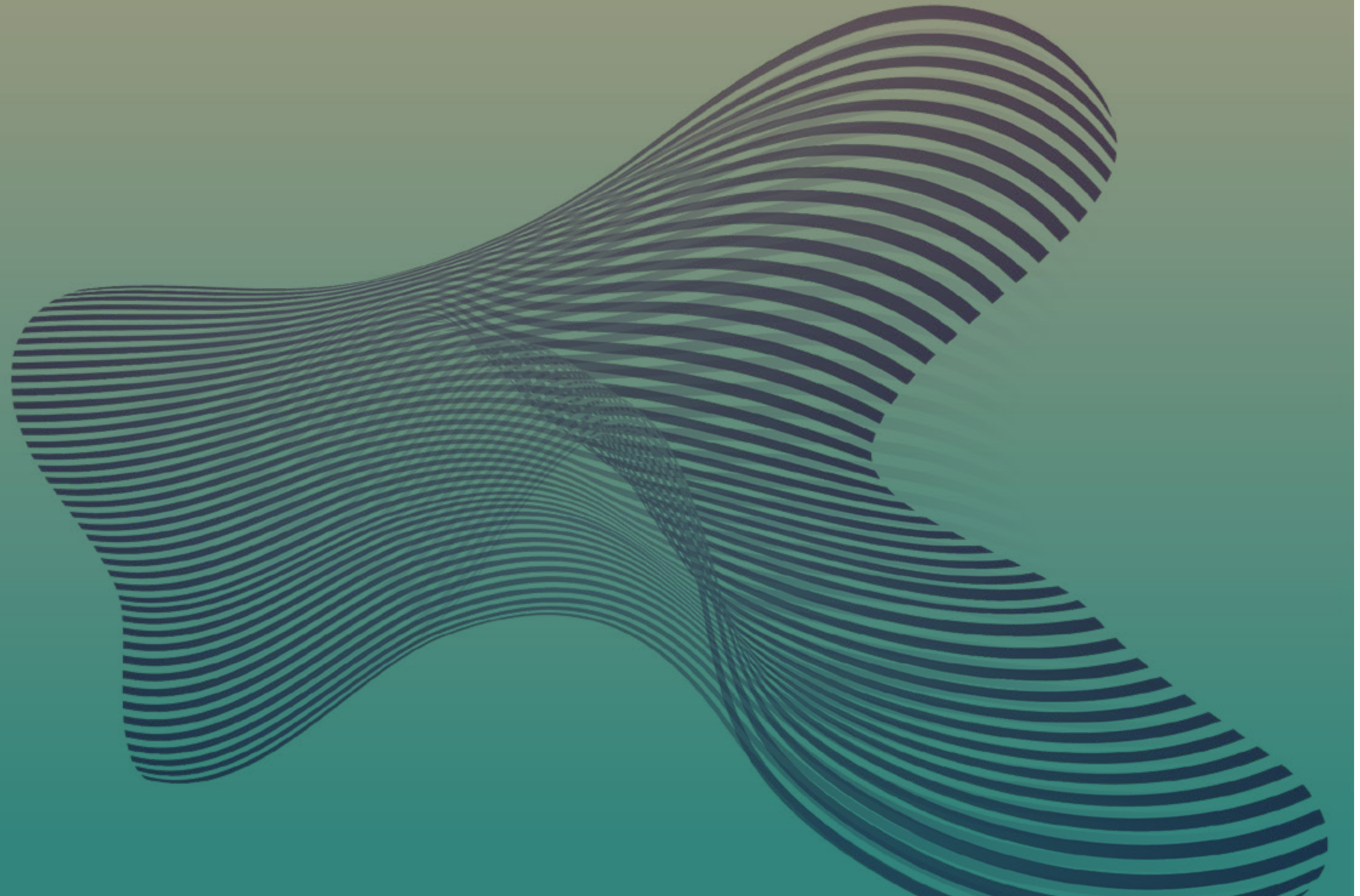
Why it’s interesting

Retirement is considered an outdated idea: 73% agree in India, followed by 64% in the United Arab Emirates, and 55% in Thailand. The growth of the older workforce shows no sign of slowing down, and exemplary individuals demonstrate that the right career can motivate ambition for a lifetime.

85

HOME CLINIC HUBS

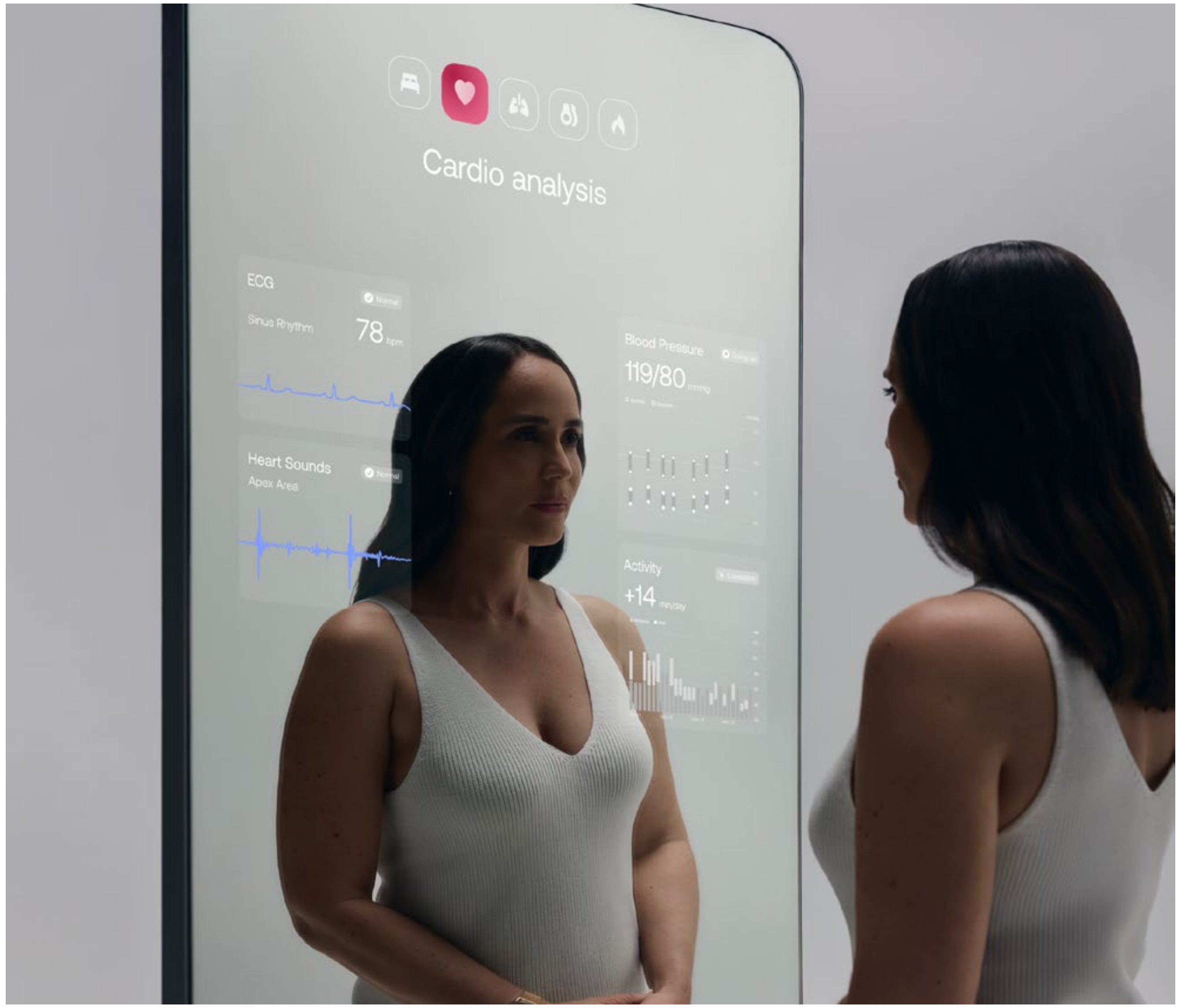
Next-generation tech revolutionizes at-home diagnostics.



What began with health apps has led many consumers to expect a greater level of health data and diagnosis in the palms of their hands, and tech companies are helping to provide that. A Cleveland Clinic survey in November 2023 found that 50% of Americans were using wearable technology to monitor their health, while a 2024 Statista survey found that 41% of respondents in China use wearable devices. At a global level, Praxis Global Alliance valued the wearable medical devices market at $9.15 billion in 2022 and predicted it will rise at a CAGR of 10% to $14.5 billion by 2027.

Pointing to how these devices are advancing is Consumer Technology Association futurist Brian Comiskey, who said during his keynote at the Consumer Electronics Show (CES) 2025, “Wearables continue to add more features to empower consumer health decision-making.” He shared that Fitbit can detect diseases such as bipolar disorder based on pacing data. Also at CES 2025, Withings introduced U-Scan Nutrio, a toilet plugin that scans the user’s urine to track ketone levels, as well as Omnia, a concept product described as a “transformative experience that reimagines digital health possibilities” by offering a holistic view of the user’s vital indicators.

And to address mental wellness at home, at CES 2024 French brand Baracoda unveiled the BMind, a smart mirror that helps evaluate mood, and offers experiences that manage stress via light therapy and personalized mindfulness practices. Belgian company Moonbird’s device, which the company claims reduces stress in five minutes, aims to foster better mental health via breathwork. The hand-held device employs the brand’s trademarked Tactile Guidance tech, which allows the user to feel the movement of six breaths per minute in their hands, guiding them to

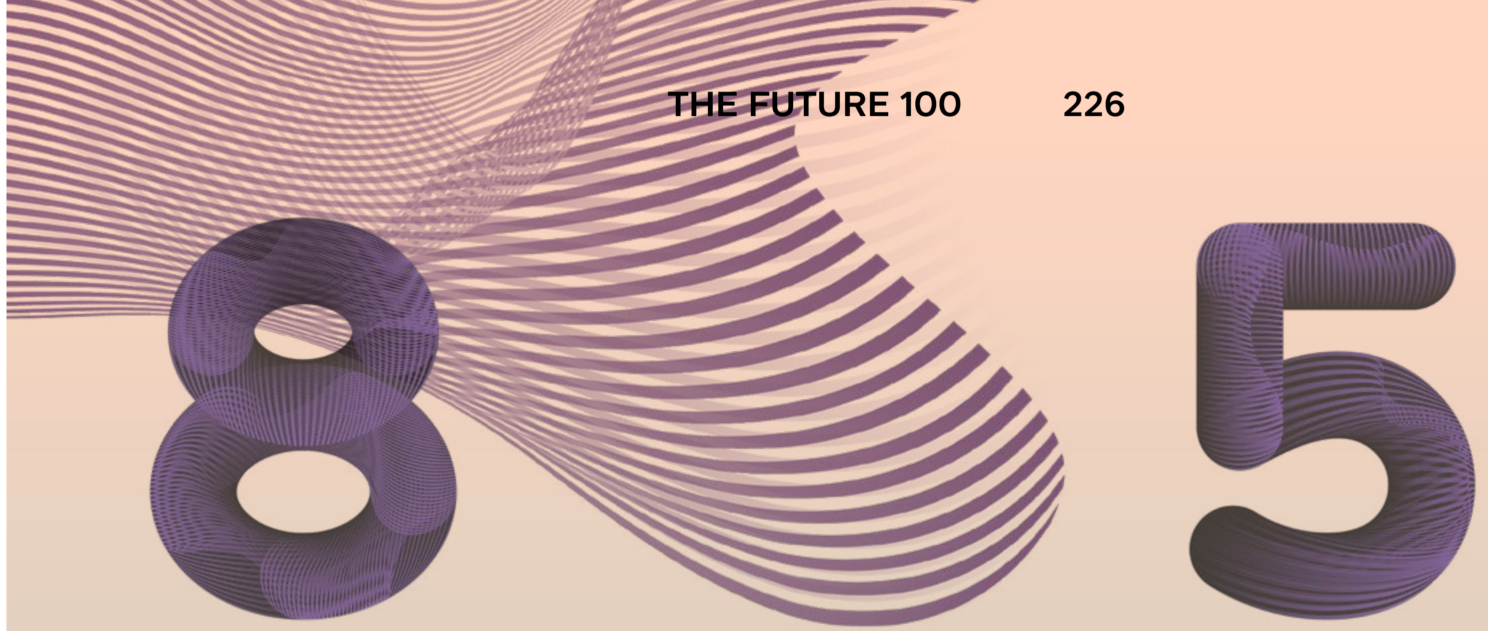

Cardio analysis
ECG
Sinus Rhythm
78
Heart Sounds
Apex Area
Blood Pressure
119/80
Activity
+14

breathe along as the device expands and contracts. The brand is also set to launch a Moonbuddy version of the device for kids.

Why it's interesting

Access to detailed personalized healthcare is easier than ever with cutting-edge at-home devices and apps putting medical insights and solutions in the hands of the consumer, helping predict health issues and boost mental wellbeing as never before.

Omnia concept product by Withings



BMind AI wellness mirror, Baracoda

86

SOCIAL PRESCRIPTION

Community activities are proven to boost health.
Doctors know this, and now brands are taking notice.

A robust, balanced, and clear mind is a much-valued asset. That's why so much of the rapidly expanding wellness market is geared toward cultivating emotional health (see "The Future 100: 2022" Emotional health trend). Now evidence is mounting that people can derive real mental wellbeing benefits from community-based activities—even more so when such actions involve helping others.

Social prescriptions emerged in the United Kingdom, as medical professionals realized that there was more to preventing or curing disease than prescribing drug treatments. The category is broad by nature. Social prescriptions encompass any activity that is beneficial and doesn't happen in a clinical setting, ranging from participating in a life-drawing class to tidying up a local green space or even getting help with bills. Dancing in a group is one type of social prescription coming to the fore. So too are gardening, contact with nature, and the arts. Studies have shown that participation helps people live longer, staves off depression, and alleviates stress. And people are already tuned in to its benefits: 73% of people think wellbeing should be social or connect them to a community.

Research is also emerging to suggest that purpose-oriented activities, such as offering a service of some kind, seem to be particularly effective: helping others, or the community, helps people feel less helpless.
A BBC piece on volunteer prescriptions quotes Stephen Post, professor of preventative medicine at Stony Brook University in New York, who says, "When you volunteer, you get away from the problems of the self, and experience so many internal benefits—you're happier, more tranquil, more resilient."

> IT'S ABOUT CONNECTION AND SHARED EXPERIENCE AND THE EMPOWERMENT ASSOCIATED WITH HELPING OTHER PEOPLE.
>
> Jess Smith, founder, J Renée

Social prescription is even being used to help communities heal. In Ukraine, youth organization Repair Together stages "clean-up raves" where citizens try to undo some of the damage wreaked by conflict, spurred on by the four-four beat of a techno DJ. In 2024 the organization announced the Great Women's Build Project, the rebuilding of 16 homes in the Chernihiv region by an all-female team.

How might brands tap this opportunity? Jess Smith is founder of J Renée, a strategic advisory service for wellness and beauty brands. She observes a clear opportunity for hospitality businesses in social prescription. "There's a search for meaning that is creating a rising interest in spirituality, mystical experiences, and ancient wellness practices," she tells VML Intelligence. "It's about connection and shared experience and the empowerment associated with helping other people."

Toloka rave, Ukraine, Repair Together

Smith cites the Sanctum Frequency Festival as a template for brands. The event began in the Netherlands and is going global. Its website promises "radical self-care and joyful healing," and guests assemble in their hundreds to follow an instructor through a range of high-energy movements and collective cathartic shouting. Noise-cancelling headphones provide the soundtrack and events are candle-lit.

The volunteer approach offers an alternative route that brands can emulate. Corporates have long made space for employees to do this, but the opportunity can be extended to customers too, considering the benefits. Patagonia's Action Works program, which connects people to climate projects in their area, provides a model for brand-facilitated participation that could be extended to community projects.

Why it's interesting

Social prescription is spreading globally, beyond its United Kingdom origins. There are multiple ways that brands could harness this idea to positively impact society while also enhancing brand reputation and fostering a sense of belonging around shared values.

repair together
repair together
repair

Toloka rave, Ukraine, Repair Together

87

OZEMPIC WORLD

The global appetite for weight-loss drugs is driving disruption across industries.

GLP-1 weight-loss drugs such as Ozempic are the catalyst for a pronounced shift in consumer preferences and needs across a wide range of categories. According to venture capital firm PeakBridge, the market for the drugs grew by 300% between 2020 to 2023 in the United States, where one in eight consumers are said to have used them. This correlates with VML data which finds 12% of global consumers say they have done so. Generative AI-powered consumer data platform Tastewise reveals that social media discussion about GLP-1 skyrocketed by 1,054%

Lemme GLP-1 capsules

in 2024. And the trajectory is still upward, with patents on both Ozempic and Wegovy due to expire in China as early as 2026. Roots Analysis suggests the global market will expand at a CAGR of 11.1% until 2035.

With the drug suppressing users' desire to eat by 20-30%, according to Morgan Stanley research, it is reshaping consumers' relationship with food. John Furner, executive director of Walmart in the United States, said, "we see a slight retraction in the overall basket. Fewer units, a little less calories," as GLP-1 users embrace protein-rich, low-carb options, and home-made meals. Morgan Stanley also reports that nearly two-thirds of GLP-1 users are spending less on restaurants and takeaways. Alcohol too is reportedly less appealing to users. Nestlé has responded to these emerging needs with the launch of its Vital Pursuit meal range, which offers nutritional support to GLP-1 patients, while CostCo has launched a specialized health care service for weight loss.

Physical changes due to the rapid weight loss associated with drugs like Ozempic will also drive opportunity in beauty and aesthetics. Skincare and treatments focused on skin elasticity, firming, and plumping are likely to see rising interest as users seek to combat so-called "Ozempic face," which refers to hollowed-out appearance and skin laxity. Haircare too stands to benefit, tackling loss in hair density related to weight loss. (See Scalp health revitalized, page 166). As for the body, the *Guardian* reports that gyms and fitness centers are already putting more emphasis on free weights and machines as people are losing muscle mass, not just fat, on GLP-1 drugs, and seeking to maintain muscle.

In fashion, *Vogue* sees an opportunity in wardrobe makeovers for those with body transformations to show off, while the Ozempic effect is already being felt at resale sites: Poshmark has reported a 78% increase in new listings mentioning "weight loss." Retail intelligence platform Edited reveals that dress options that are a US 14 and above have decreased by 15% year-on-year. In tandem, *Vogue Business* highlights a move away from inclusivity by brands on the S/S25 runways, suggesting the pendulum may be swinging backward on an already fragile size inclusivity movement.

VITAL PURSUIT
Cauliflower Crust Pepperoni Pizza
22G
4G
Southwest Style Chicken Fajita Sandwich Melt
22G
6G
31G
Vermont White Cheddar Mac & Broccoli Bowl
21G
4G

Vital Pursuit by Nestlé

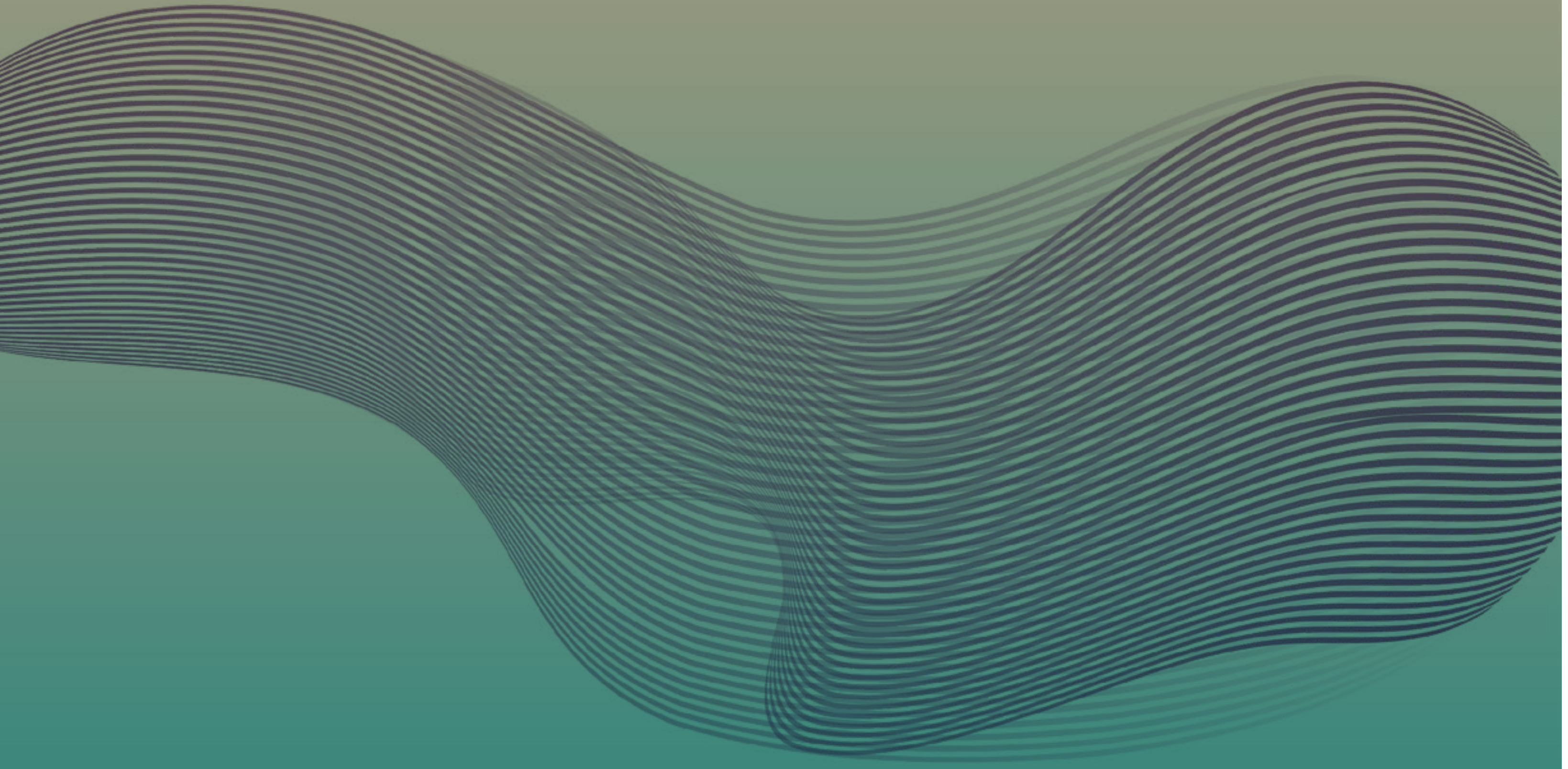
Why it's interesting

GLP-1s are disrupting lifestyles and reframing the conversation about weight management. In the Ozempic era, brands will find new opportunities to cater to emerging need states, but will also need to navigate the ethics of equitable access, the evolving conversation around body image, and the long-term health impacts of these drugs.

88

THE DEVOLUTION OF HEALTHCARE

The future promises an era of self-managed, pre-emptive healthcare.



In the future, trips to the doctor's office will be by invitation only. Digital health dashboards will instead allow doctors to monitor patients remotely, while also empowering individuals to take control of their own everyday health thanks to an array of devices, wearables, and ambient sensors in the home serving up actionable insights. This is welcome news for the 87% who think people should take more responsibility for their own health.

As healthcare labor shortages grow—the World Health Organization predicts a 10 million shortfall of workers worldwide by 2030—technology that can monitor health and provide diagnosis in the home will help deliver care to more, for less.

Instead of that annual physical exam, how about a video selfie? More than a dozen companies are already working in this space, including Israel's Binah.ai and Australia's Upvio, whose FaceVitals smartphone tool can deliver a biometric health assessment in 30 seconds.

NuraLogix Anura MagicMirror

Other innovators are working to integrate health-tracking and diagnostic capabilities into the fabric of the home. Among them is NuraLogix's Anura MagicMirror, a tabletop smart mirror that analyzes facial blood flow information to accurately calculate myriad vital signs and disease risks. The mirror is powered by the company's cloud-based affective AI platform DeepAffex and aims to "make accurate health data ubiquitous in people's lives." The mirror can assess vital signs spanning blood pressure, breathing rate, stroke risk, heart attack risk, and risk of depression and anxiety, all captured in a 30-second scan.

At the Consumer Electronics Show 2025, French health tech startup Withings launched the BPM Pro 2, a home blood pressure device which gathers patient-reported insights on health status, treatment efficacy, and quality of life. The Health Nudges feature even allows healthcare professionals to send motivational messages and reminders.

Toilets are another focal point for data gathering. A study at the UMass Chan Medical School's Program in Digital Medicine in the United States is evaluating how a sensor-embedded toilet seat that measures heart rate and oxygen saturation can help patients with chronic diseases. The idea is that the seat could measure blood pressure and heart-related variables, to determine which patients need further care, without the need for an echocardiogram.

Innovations are also pushing the boundaries of remote patient monitoring, which allows healthcare professionals to track patient vitals and spot early signs of disease progression. Ambient intelligence, or AmI, sees contactless biosensors embedded in physical environments, such as underneath a mattress, allowing data to be gathered passively on metrics like heart rate and breathing. Applications include keeping tabs on heart patients or identifying early signs of dementia.

BPM Pro 2, Withings

When systems like these are coupled with AI, they will speed insight and enable preventive care, anticipating health issues and ensuring resource is directed where needed. At SXSW 2024, Dr Jag Singh, a professor of medicine at Harvard Medical School, summed this up. He told the Austin audience: "We are at the beginning of the end of the way we conventionally practice medicine. The future of care will be sensor-aided, will be virtual, will be powered by artificial intelligence and predictive analytics that will be integrated into our clinical workflows and translate into better clinical outcomes."

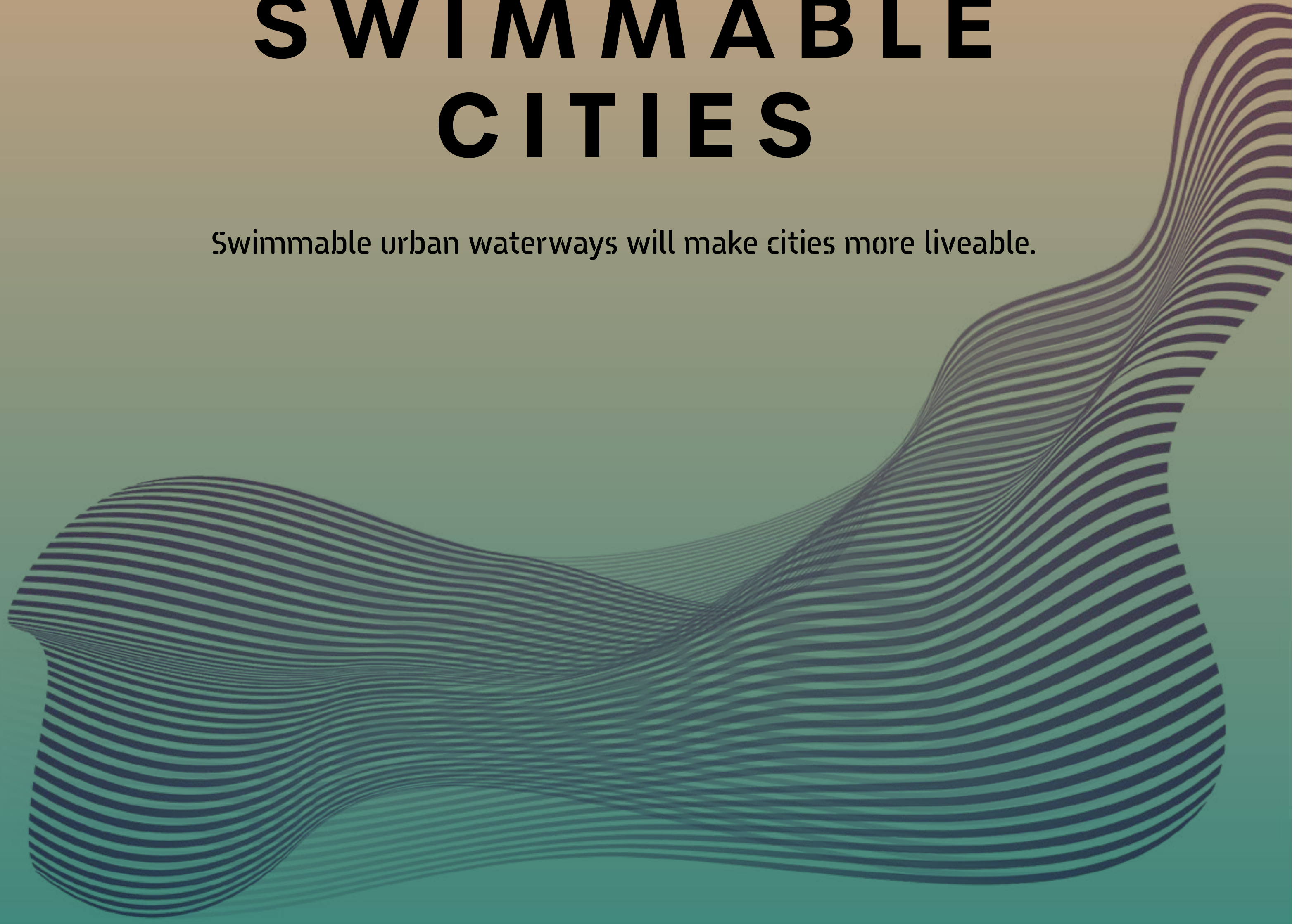
Why it's interesting

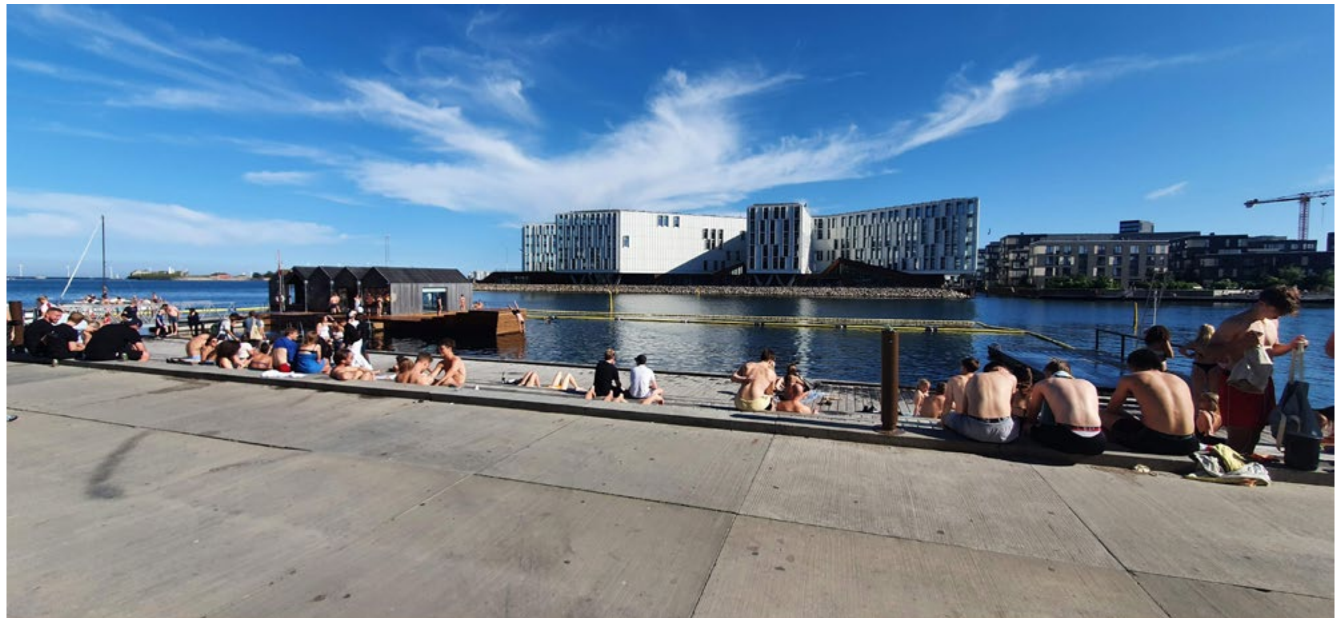
Advances in AI, data, and ambient sensors will converge to transform the patient experience, allowing health to be being monitored in real time and helping to pre-empt serious health problems.

89

SWIMMABLE CITIES

Swimmable urban waterways will make cities more liveable.





Above top: Nordhavn, Copenhagen. Courtesy of Matt Sykes
Above: Islands Brygge, Copenhagen. Courtesy of Matt Sykes

As cities grapple with overcrowding, urban heat, and pollution, cleaning up waterways could offer up a new kind of public space, bringing both mental and physical health benefits.

Advocates around the world are clamoring for access to swimmable waters within their cities and have formed collectives such as the Swimmable Cities alliance, a global network of urban swimming campaigners. Its founder, Australian landscape architect Matt Sykes, tells VML Intelligence that the goal is to prove the concept and then scale. “By 2030, we’d like to have 30 swimmable cities setting a precedent and then support 300 cities to begin their journey towards swimmability. It’s not just about celebrating big cities like London and Paris, but also about how you empower other cities.”

Considering the state of many urban waterways, river swimming might seem like a fantasy, but proving otherwise, four pools, built at a cost of €10 million ($10.5 million), will open in the Seine in Paris in 2025, offering free lockers, showers, and changing rooms. Sykes also cites New York East River’s ambitious Plus Pool, a swimmable and innovative waste-water treatment facility engineered by Arup. “It started as a labor of love from a small group of dreamers. There was no regulatory pathway to build it, but I realized this project had a larger implication than just building one piece of infrastructure,” explains project founder Kara Meyer, who has worked for 14 years to make Plus Pool a reality. Set to open this year, the project raised $16 million in state and city funding, and brought positive change to water policies in its wake.

From Rotterdam to Sydney, change is afoot, and Copenhagen offers a shining example of how to transform formerly polluted waterways and reinvigorate industrial corners of the city in the process. Søren Leth, cofounder of the architectural firm Sleth, which is behind key restoration projects in Nordhavn and Aarhus, tells VML Intelligence: “Not only has opening harbor baths reinvigorated areas of the city, memberships of bathing clubs around the city have exploded as people want to be part of a community and use the saunas.”

> **BY 2030, WE’D LIKE TO HAVE 30 SWIMMABLE CITIES SETTING A PRECEDENT AND THEN SUPPORT 300 CITIES TO BEGIN THEIR JOURNEY TOWARDS SWIMMABILITY.**
>
> Matt Sykes, landscape architect

Why it’s interesting

With increasingly urbanized environments, it is vital to reassess what livability looks like. Blue infrastructure can cool cities and citizens, and provide habitats for wildlife, all while reframing the concept of public space.

Swimming in the Rhine, by Tanja Ecker. Courtesy of wickelfisch.ch

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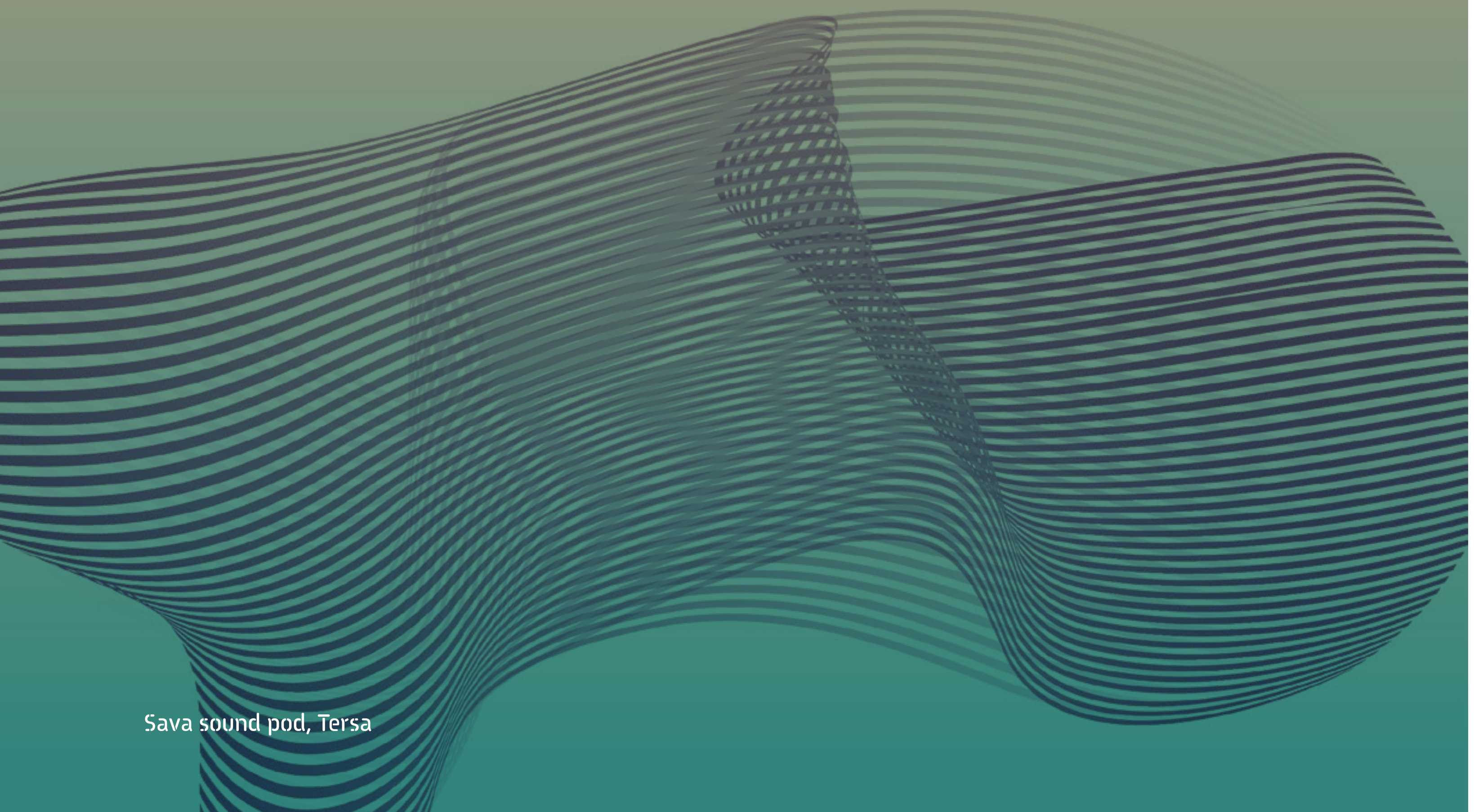
VIBROACOUSTIC THERAPY

Sound healing is getting an intelligent upgrade.



Sava sound pod, Tersa

Wellness company Tersa hosted a sound healing pop-up in Los Angeles in July 2024 to launch the Sava sound pod, which it describes as “the future of holistic recovery.” Combining vibroacoustic technology (VAT), emotional intelligence, AI, and binaural beats, it is “an immersive self-care experience” that heightens meditation and recovery.

Five years in development, Sava is a human-sized sound pod with curved wings and a womb-like shell, offering a cradle-like experience that blends body vibrations and immersive music. Ten high-powered transducers strategically positioned beneath the legs, hips, back, and shoulders synchronize with four spatial sound speakers surrounding the head. This configuration, controlled via a mobile app, allows users to personalize their wellness experience based on their mood and goals.

VAT TECHNOLOGIES ARE EMERGING AS VALUABLE TOOLS IN HOLISTIC HEALTH.

Tersa's founder and CEO Ray Kelly, a renowned rehabilitation expert with over two decades of experience in the field, tells VML Intelligence, "Our holistic approach aims to help people not only feel better day to day but also to connect to a higher state of consciousness, which I believe is the foundation of optimal wellbeing."

Initially developed in the 1980s, the non-invasive, drug-free nature of VAT has made it increasingly popular in wellness settings, spanning physical rehabilitation, mental health, and self-care. Modern advancements in VAT technology have led to more accessible, effective wellness solutions, with recent studies indicating that VAT can elevate emotional wellbeing by reducing depression and anxiety symptoms while enhancing cognitive function and mental clarity.

Sava retails for $10,000 and currently targets the professional and hospitality markets but a more affordable version could see its way into homes in the next couple of years. For now, there's also the Opus SoundBed at $1,999. Delivering seven channels of spatial sound and vibration from head to toe, SoundBed creates a cocoon-like sensory environment or treatment can be directed to specific areas. Cofounder and CEO Christopher Schenk highlights its design as compact and user-friendly, seamlessly integrating into daily routines and most spaces. By using vibroacoustic technology to generate low-frequency vibrations, SoundBed swiftly transitions users from stress into profound relaxation.

Why it's interesting

Adaptable for both personal and clinical use, VAT technologies are emerging as valuable tools in holistic health, blending advanced technology with the therapeutic power of sound and vibration.

SoundBed, Opus

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INNOVATION

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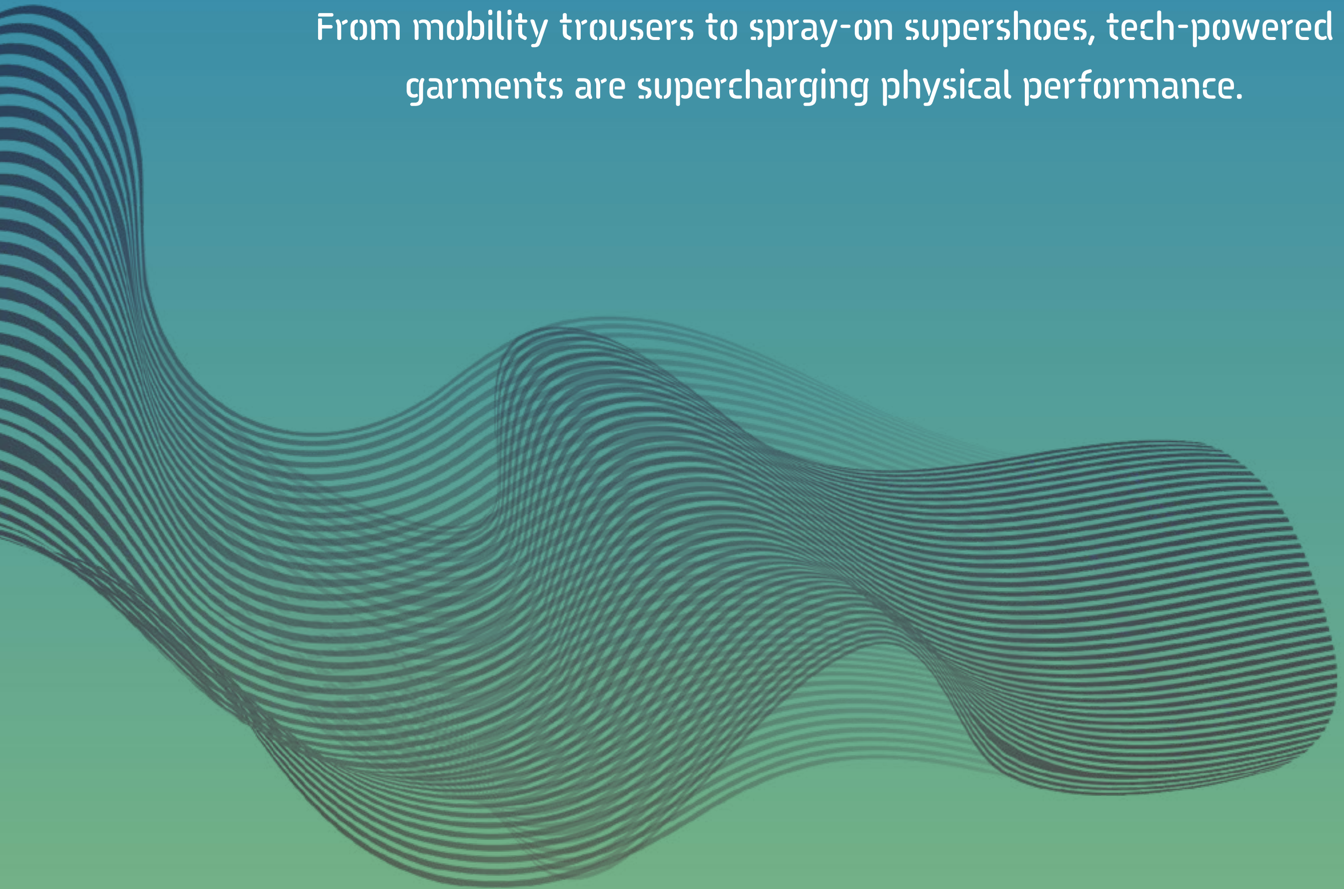
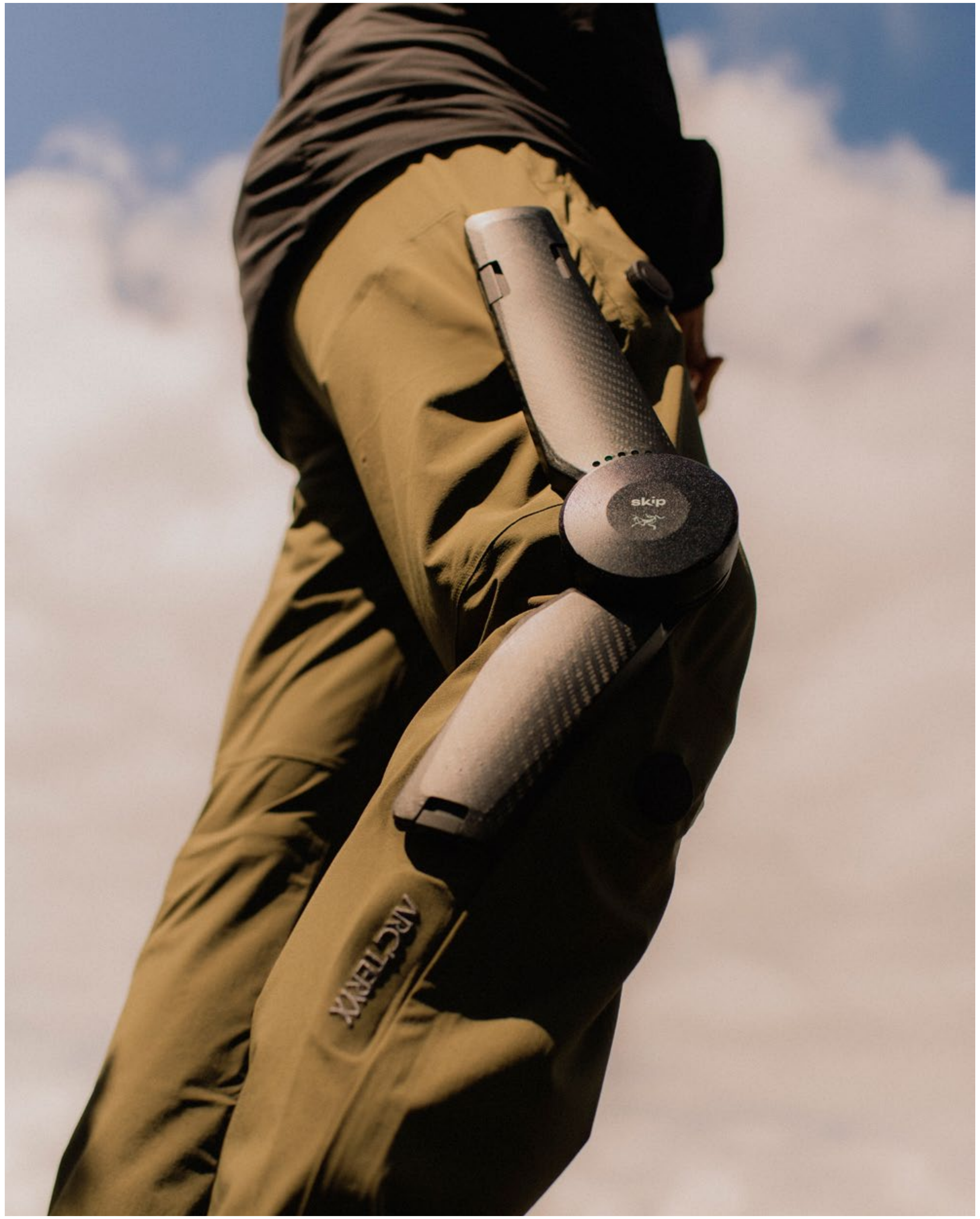
AUGMENTED HUMANS

From mobility trousers to spray-on supershoes, tech-powered garments are supercharging physical performance.





Mobility trousers by Arc'teryx and Skip

Upleveling walks, hikes, and runs are new mobility trousers by Canadian apparel company Arc'teryx and movewear tech startup Skip. Mo/Go is "the world's first pair of powered pants designed to make human movement more joyful," according to the launch announcement made in July 2024. The design's robotic mechanism increases the wearer's stamina, while reducing signs of fatigue or pain. In addition, for uphill climbs there is a reported 40% boost to leg muscles and, for the downward journey, support for the knees, using a suite of connected sensors to assist movement. Benefits for those with mobility challenges are apparent, as are those for people keen to excel in outdoor recreational activities. The powered pants will be available for shipment late 2025.

Another personal mobility products company, Shift Robotics, launched the Moonwalkers Aero powered overshoes in September 2024—a lighter, quieter, and more personalized follow-up to its predecessor original Moonwalkers. The shoes are designed to help people walk faster (at a top speed of 7 mph) or, for those with walking limitations, to move smoothly and naturally in outdoor environments.

Sneaker companies are also on a mission to create the ultimate supershoe—lightweight footwear that improves athletes' performance. In July 2024, Swiss sportwear company On unveiled the Cloudboom Strike LS shoes, made using a bespoke technology called LightSpray. A robotic arm sprays on the upper part of the shoe in only three minutes, in a process that does not require glue or seams, and claims to reduce CO2 emissions by 75% compared to those generated by other racing footwear. The shoes, currently On's lightest, were debuted by Kenyan long-distance runner Hellen Obiri at the Paris Olympics. So effective are some of these augmentation innovations in sport that they have ignited controversy over

LightSpray by On

whether they ought to be considered "tech doping" for the advantages they deliver.

Neverthless, kit innovation is a crucial aspect of sport, delivering gains for athletes and keeping them injury-free. Nike is collaborating with recovery tech company Hyperice on temperature-controlled boots and a vest that offer optimal warm-up and recovery for wearers. Feedback on the products has been positive. Basketball star LeBron James tested the prototype and said, "I knew they were going to change the game for athletes' warm-up and recovery." The boots and vest are still in testing phase, with a release date yet to be announced.

British apparel brand Vollebak is known for its innovative approach to material and design: its tagline is "clothes from the future." One of its latest releases is the Martian Aerogel jacket for extreme cold, featuring the same parachute material that NASA used to land the last Rover on Mars. The jacket's material is ultra-light and insulated—cold air passing through is "almost impossible" as it is made of individual nanopores that are 10,000 times thinner than human hair. This was put to the test when a volunteer sitting completely still in -20°C conditions wearing the jacket maintained a stable core temperature for 20 minutes.

Why it's interesting

Innovation in garment and footwear is powering up human performance, benefiting everyone—from those with mobility limitations or muscle loss to athletes looking to improve their form. Being superhuman never looked so good.

Nike X Hyperice vest

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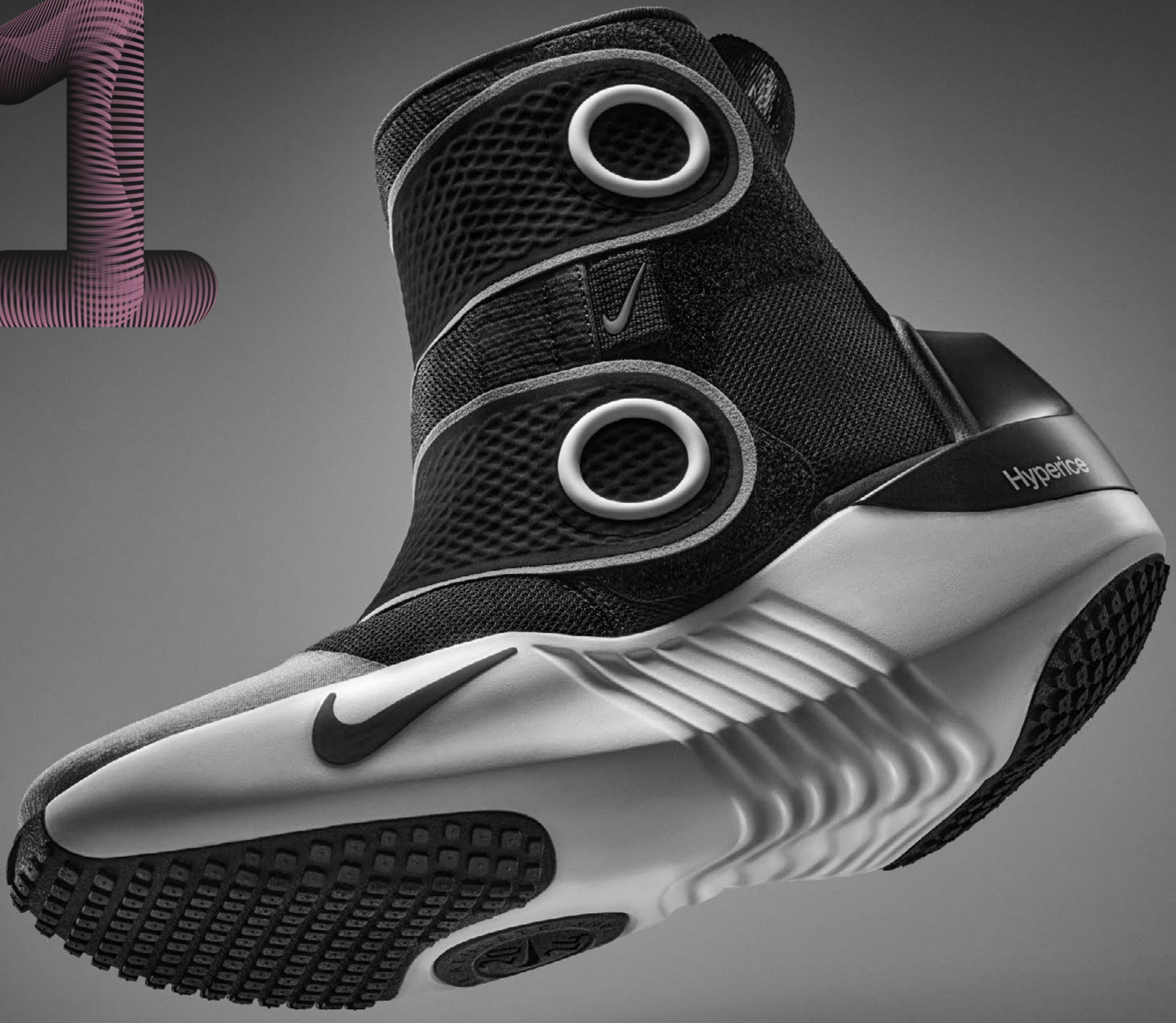

Boots, Nike X Hyperice

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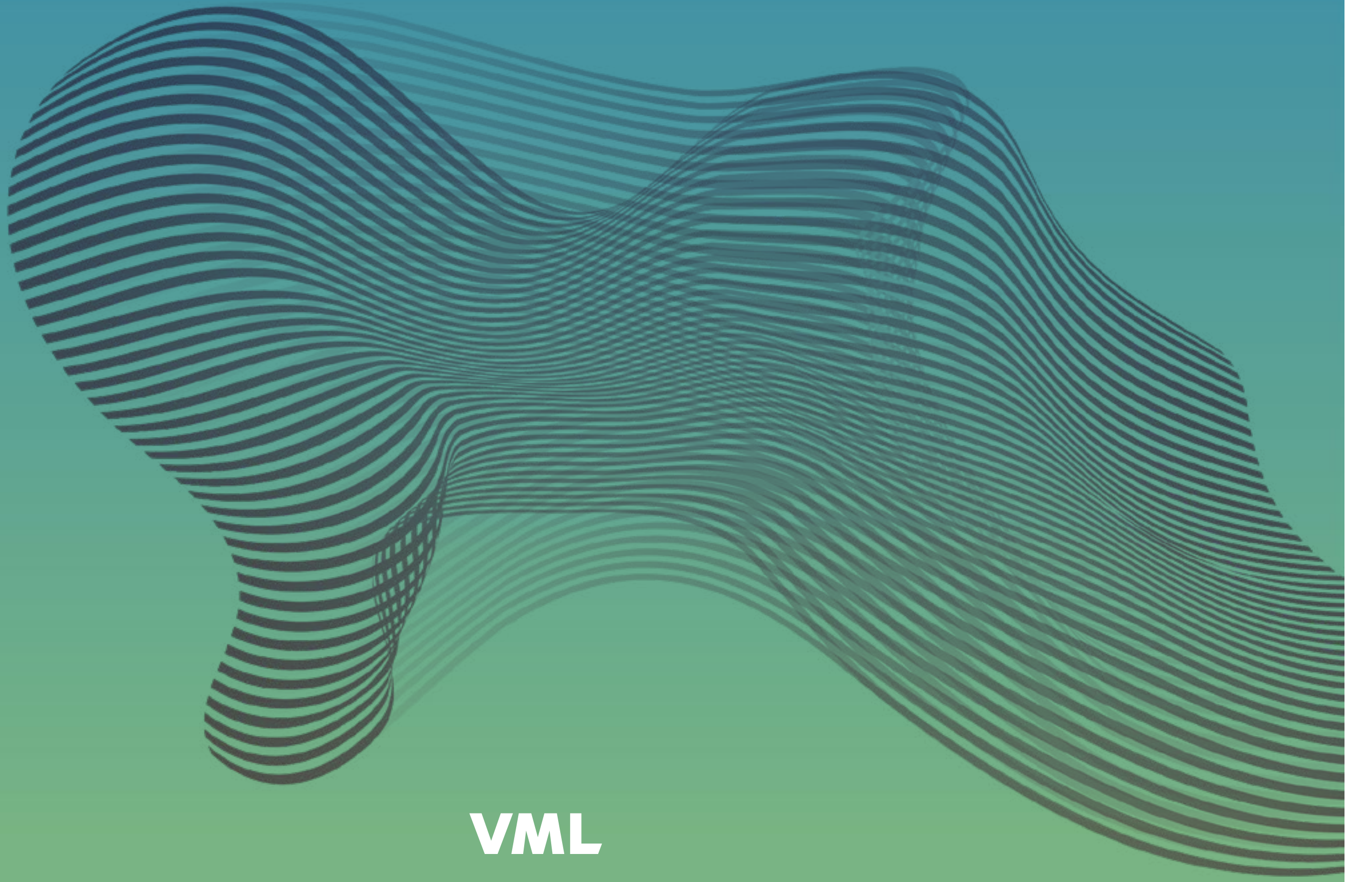
DIGITAL IMMORTALITY

Living for an eternity could be possible in the digital realm.



VML

MrBeast revealed in October 2024 that he has created around 15 videos for his team to publish after he dies. The American YouTube mega-influencer has the largest following on the channel, with 344 million subscribers as of January 2025. His strategy is in place for his posthumous YouTube life, which would see his team upload his “My Last Video” and proceed with releasing a new video a month to continue his legacy. On the *Impaulsive* podcast he joked, “I’m probably in a coffin right now just chilling. Don’t feel bad for me, I’m dead.”

Recent advances in AI have also surfaced the potential of resurrecting celebrities. British talk-show host Sir Michael Parkinson died in 2023, but in October 2024, production company Deep Fusion Films announced a new podcast featuring an AI recreation of Parkinson’s voice to host an interview series. The show, *Virtually Parkinson*, is intended to continue his legacy and is backed by his family. And in March 2024, digital persona creator Soul Machines used its patented “biological AI” technology to unveil a digital clone of Marilyn Monroe, who died in 1962. The concept of the digital afterlife is further explored in Grief tech, page 67.

Transhumanists advocate for technology that can extend a human’s life, even if that means surrendering our biological selves. The 2024 book *Transhuman Citizen: Zoltan Istvan’s Hunt for Immortality* by Ben Murnane tells the story of Zoltan Istvan, political candidate and founder of America’s Transhumanist Party, who ultimately wants everyone to live forever as cyborgs. Murnane describes transhumanism as going beyond what’s human through science and technology, with the prospect of immortality. “It’s the idea that we should want to be ‘more than human’—whether that’s because we can upload our minds to computers or we can have cyborg arms and legs,” he tells VML Intelligence.

IF THERE IS A PATH TO IMMORTALITY, IT'S CERTAINLY THROUGH TECHNOLOGY.

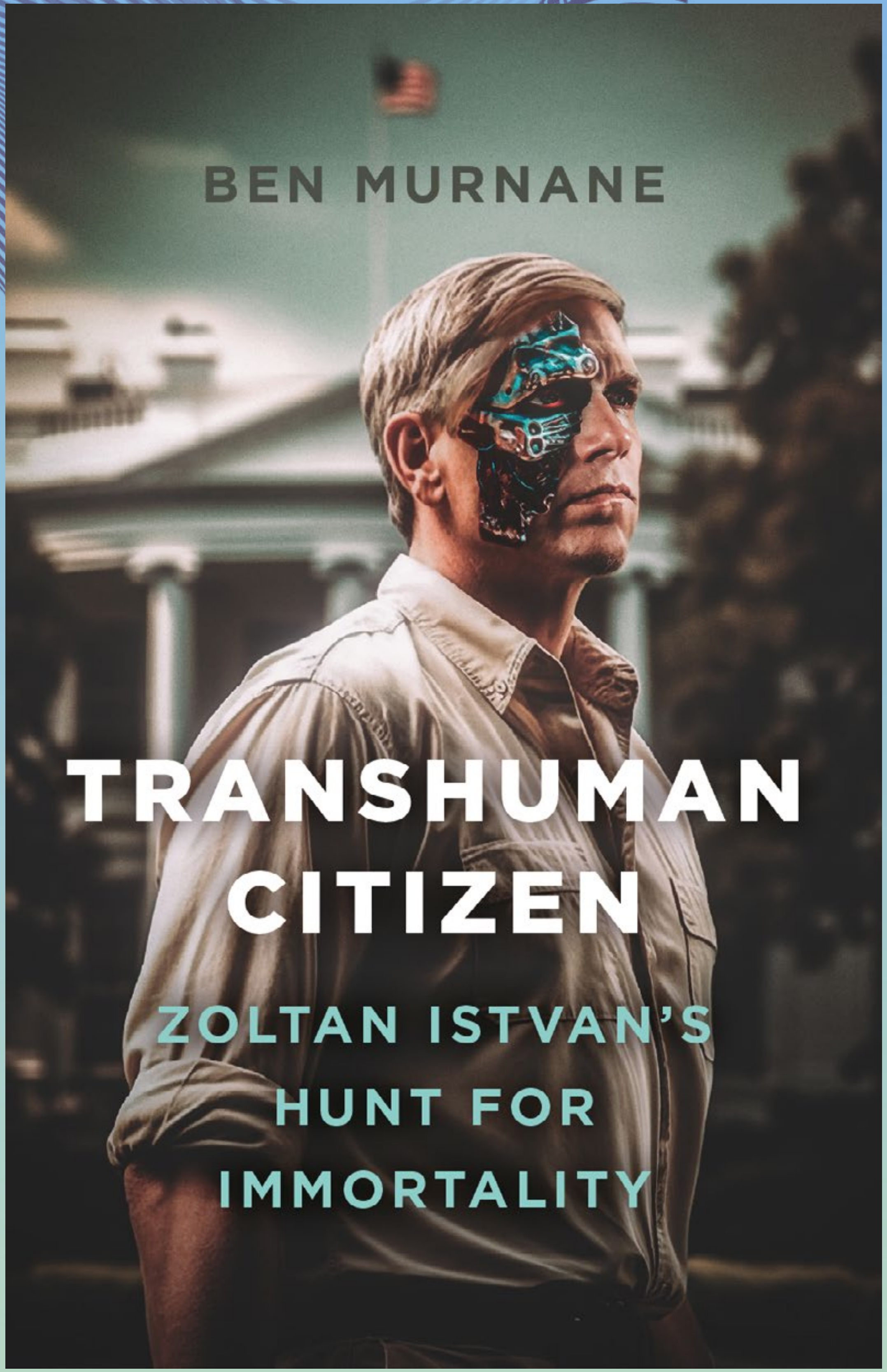
Ben Murnane, author

Mind uploading—transporting a person's consciousness onto a computer—is another area that scientists and philosophers are investigating. There are still many unknowns in this space, as Murnane observes. "We don't know how consciousness might change, if it could be 'removed' from the human body." However, he also says technological advances offer a promising future. While these concepts might seem the preserve of science fiction, AI demonstrates it can preserve some aspects of a "person." Ultimately, Murnane believes, "if there is a path to immortality, it's certainly through technology."

Why it's interesting

At a time when 71% of people globally think that the line between what is human and what is technology will blur in the future, the possibility of immortality could lie in the technology that is rapidly being created around us. Are we prepared for a generation of digital citizens?

Transhuman Citizen: Zoltan Istvan's Hunt for Immortality by Ben Murnane



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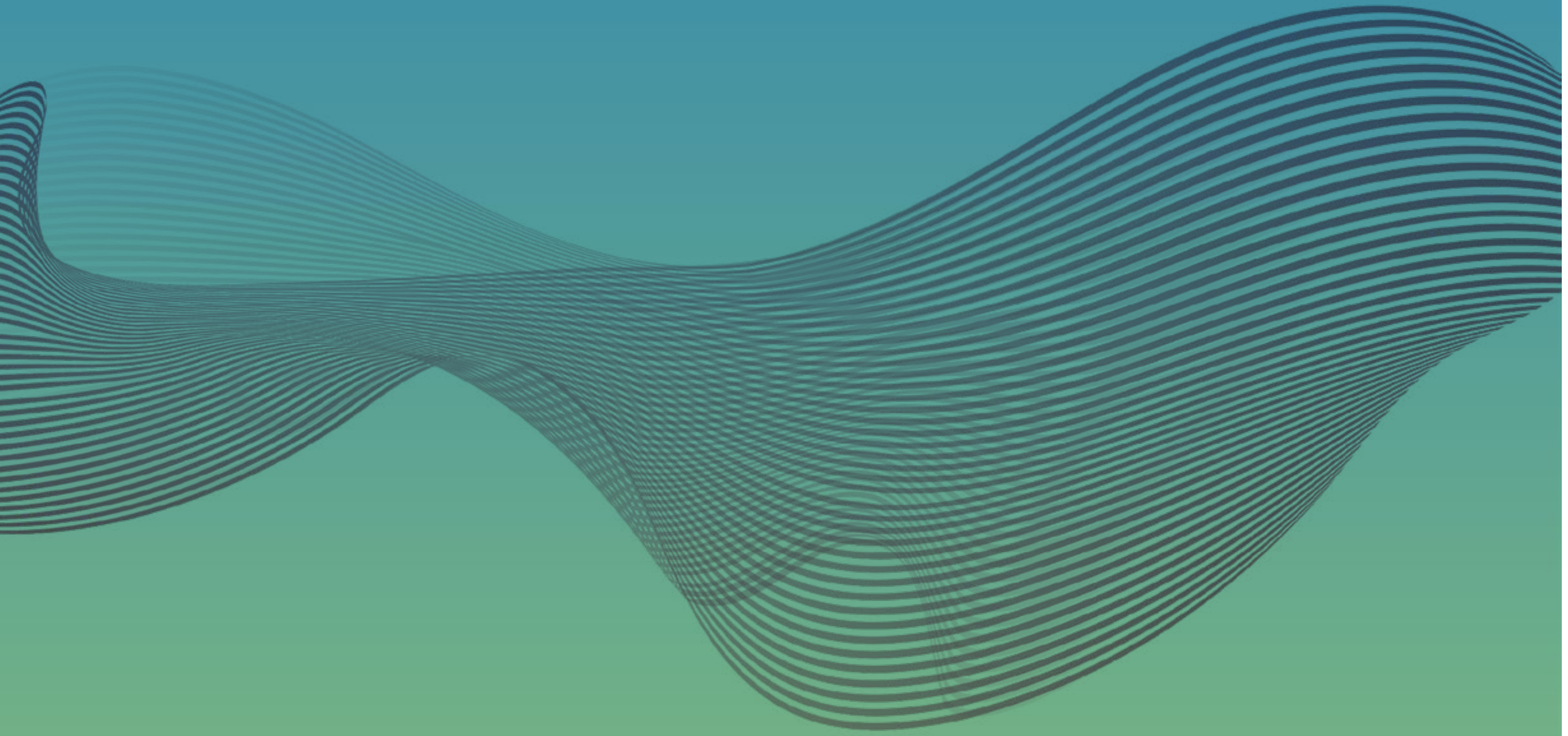
DISRUPTING THE MENOPAUSE

With later menopause associated with longevity, can it be delayed?



Science is exploring different ways to delay the menopause, as ovarian function is being touted as a key to longevity, with some treatments potentially becoming available in the near future. While there has been noise around improving women's access to hormone replacement therapy to alleviate the symptoms of the menopause, now researchers and startups are exploring whether delaying the menopause could improve women's longevity and health.

Speaking to the *New York Times*, Dr Stephanie Faubion, the medical director of the US's Menopause Society, points out that even after the ovaries stop releasing eggs, they may still protect women's health. The article points out that "through hormones like estrogen and progesterone, as well as other chemicals, the ovaries communicate with and influence virtually every other organ."

One drug that's being explored as beneficial to ovarian health is the immunosuppressant rapamycin. According to the initial results of the "Validating Benefits of Rapamycin for Reproductive Aging Treatment (Vibrant)" study, one of its leaders, Yousin Suh, told the *Guardian* in July 2024 that "it was realistic to hope the drug could decrease ovary aging by 20% without women experiencing any of the 44 side-effects rapamycin can have."

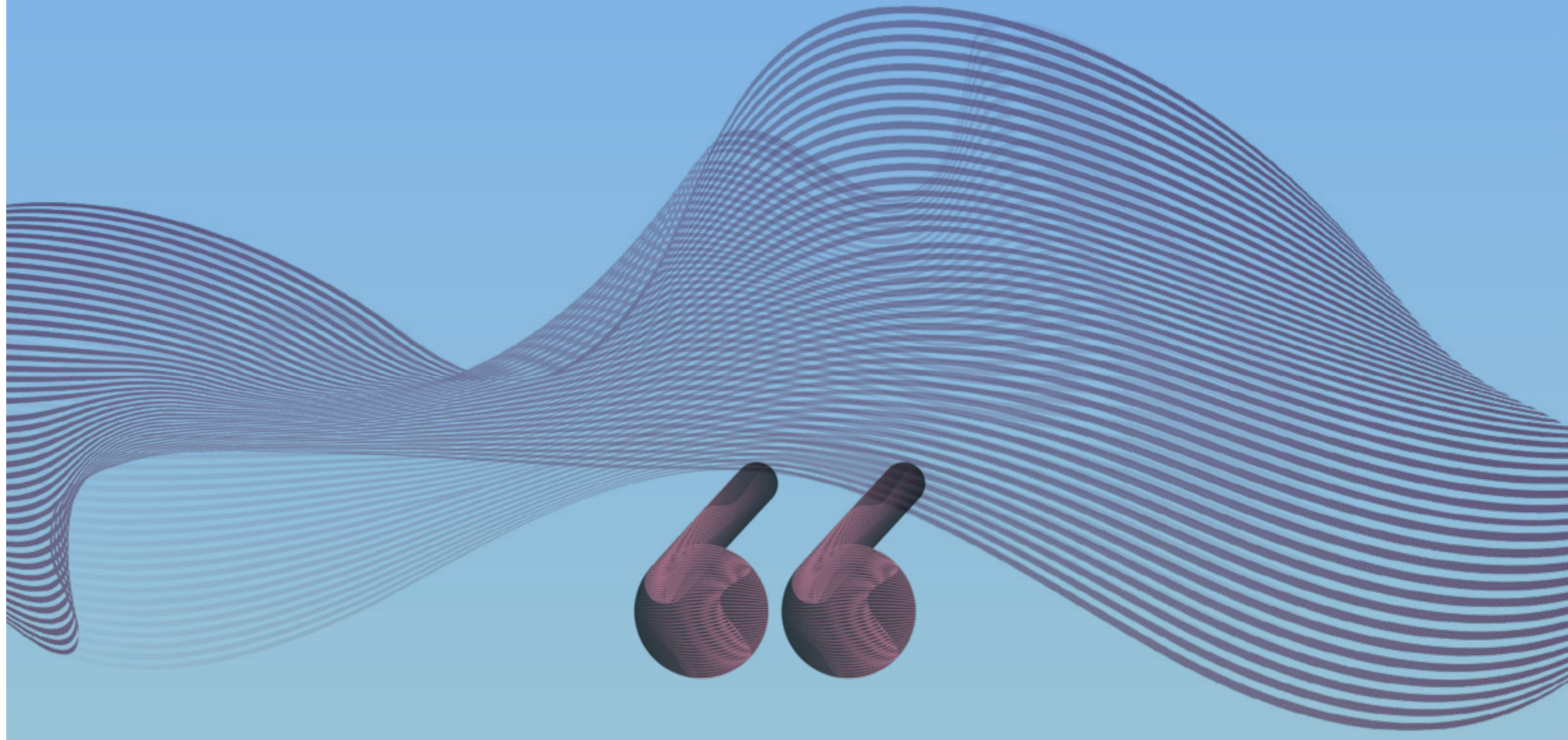
Dr S Zev Williams, principal investigator on the study and chief of the division of reproductive endocrinology and infertility at Columbia University Irving Medical Center, tells VML Intelligence that "what is particularly exciting about the approach we are using is that it is repurposing rapamycin, a well-studied drug that is already available as an inexpensive and widely available pill. If study data shows that it is safe and effective in slowing ovarian aging, it will be very easy to translate that into clinical use." Williams adds that results of the study are expected within the next 14 months. "If the results look promising, then we would want to do a larger pivotal multicenter study before the drug was in widespread use," he says.

Among the startups looking into this space is US-based Oviva Therapeutics, which says it's "developing first-in-class therapeutics to improve ovarian function and consequently extend female healthspan." The company is in the early phases of testing a pharmaceutical version of anti-Müllerian hormone (AMH), which aims to reduce egg reduction during menstrual cycles.

The Global Consortium for Reproductive Longevity & Equality (GCRLE), whose major donor is Nicole Shanahan, the former spouse of Google's Sergey Brin, via her Bia-Echo Foundation, is part of the Buck Institute for Research on Aging. (The GCRLE is soon set to take the name the Center for Healthy Aging in Women, stating: "We need to stop referring to ovaries as 'reproductive' organs—they are important for so much more than just babymaking.") According to the center: "If we want to preserve and extend healthspan in women, we need to understand the underlying drivers of ovarian aging. Ovaries are the architects of health and the pacemaker for aging in female bodies."

Why it's interesting

This new focus on how the ovaries affect female aging could have profound implications for fertility, aging, and long-term wellbeing for women.



> **OVARIES ARE THE ARCHITECTS OF HEALTH AND THE PACEMAKER FOR AGING IN FEMALE BODIES.**
>
> The Global Consortium for Reproductive Longevity & Equality

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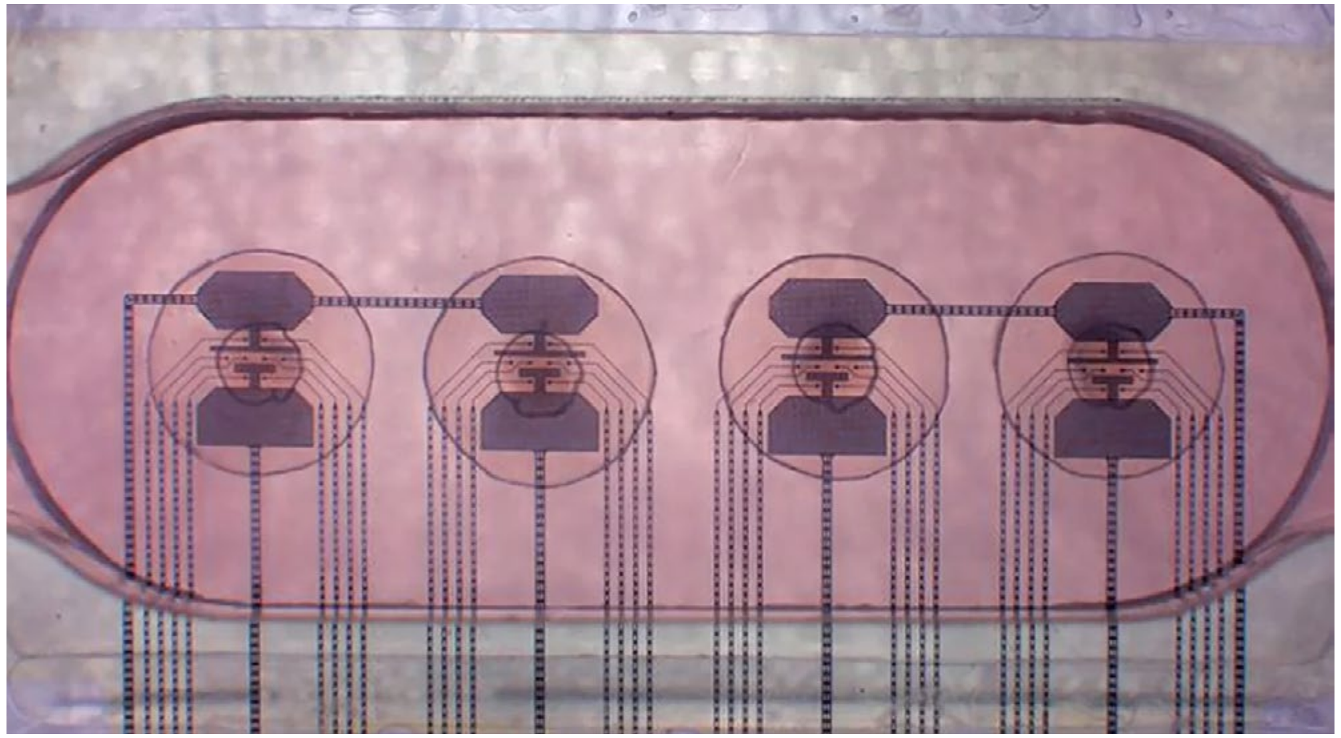
LIVING DESIGN

A new class of “living computers” and biohybrid robotics has emerged, with alternatives that offer sustainability and efficiency.



The idea of computers made from human neurons isn’t science fiction anymore. Companies such as FinalSpark in Switzerland are pioneering “biocomputing” with human-brain organoids—tiny clusters of neurons that function like miniature human brains. These organoid-based computers, which consume far less power than traditional processors, could eventually offer a 100,000-fold reduction in energy consumption for AI. Each organoid in FinalSpark’s setup is linked to electrodes that stimulate the neurons, helping them learn in ways that mirror how the human brain forms connections.

This breakthrough also brings unique possibilities. Unlike silicon-based chips that excel at repetitive calculations, brain organoids could outperform in tasks requiring adaptability, pattern recognition, and decision-making, such as interpreting visual data or understanding speech. The next steps include improving organoid lifespan, as they

Biocomputing, Final Spark

currently only survive about 100 days, and creating a scalable, cost-effective model to make biocomputing viable on a global scale.

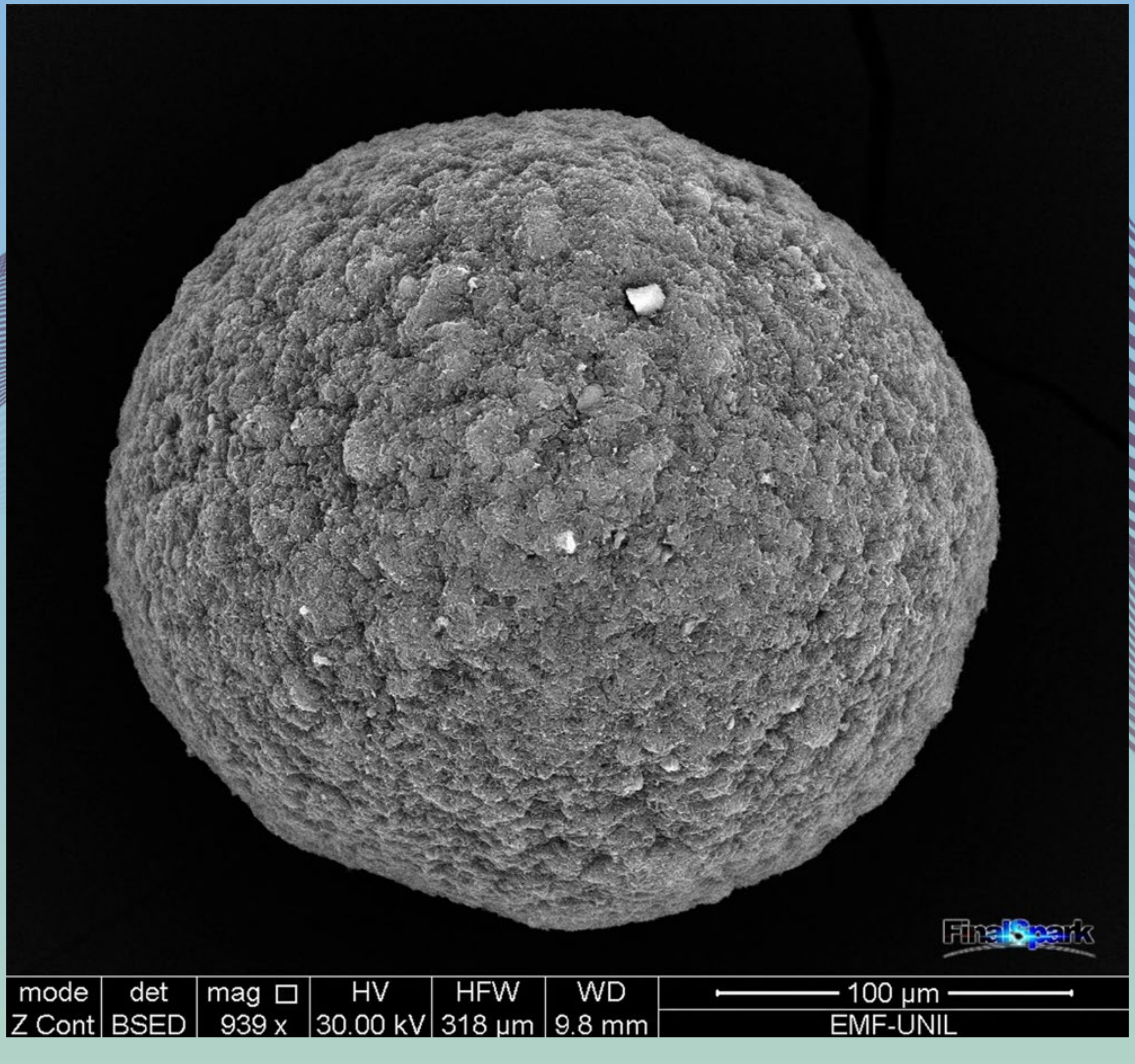
Another exciting development is biohybrid robotics, where living tissue and synthetic systems merge. At Cornell University, researchers have connected a king oyster mushroom's mycelium—a network of rootlike structures—to simple robotic hardware. This fungi-based biohybrid robot senses its environment and responds to stimuli like light, offering potential applications in agriculture and environmental monitoring.

Tokyo University has attached living skin to robot faces, mimicking the flexibility and self-healing properties of human skin. This soft, life-like covering represents an evolution from hard, synthetic shells, bringing us closer to humanoid robots that move, smile, and even repair themselves if damaged (see Robot redux, page 53).

Biohybrid technologies could lead to eco-friendly solutions in healthcare and diagnostics, lowering energy consumption and reducing waste. Living computers could soon be applied to medical AI, helping analyze patient data with far greater accuracy and speed, while using less power than current systems. Biohybrid robots with fungal or plant-based materials could monitor environmental health, detect pollution, and potentially guide treatments in agricultural spaces.

Why it's interesting

As companies start incorporating living materials, ensuring consumer trust and transparency will be paramount. Brands embracing these technologies will need to communicate how these advancements responsibly benefit consumers, communities, and the planet.



Biocomputing, FinalSpark

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ELECTROCEUTICALS

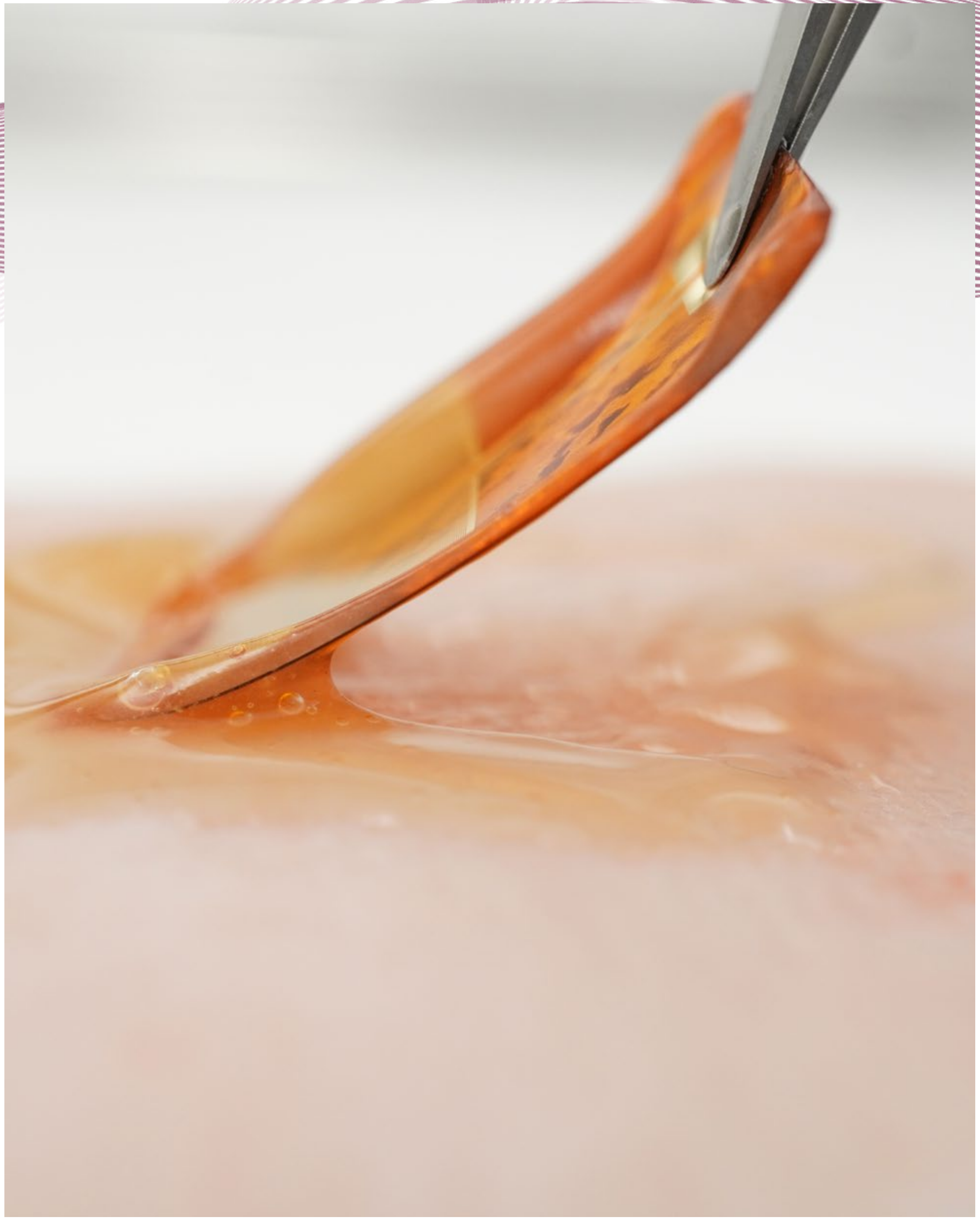
Electroceuticals are gaining attention as
a transformative frontier in medical technology.

A new kind of treatment that doesn’t rely on traditional drugs has arrived—electroceuticals. Instead of relying on chemicals, they use gentle electrical pulses to influence how different parts of the body work. As electroceuticals advance, they could bring a whole new category of wearable health tech. Imagine having a bandage that helps heal cuts faster or a device that delivers your medication right when you need it.

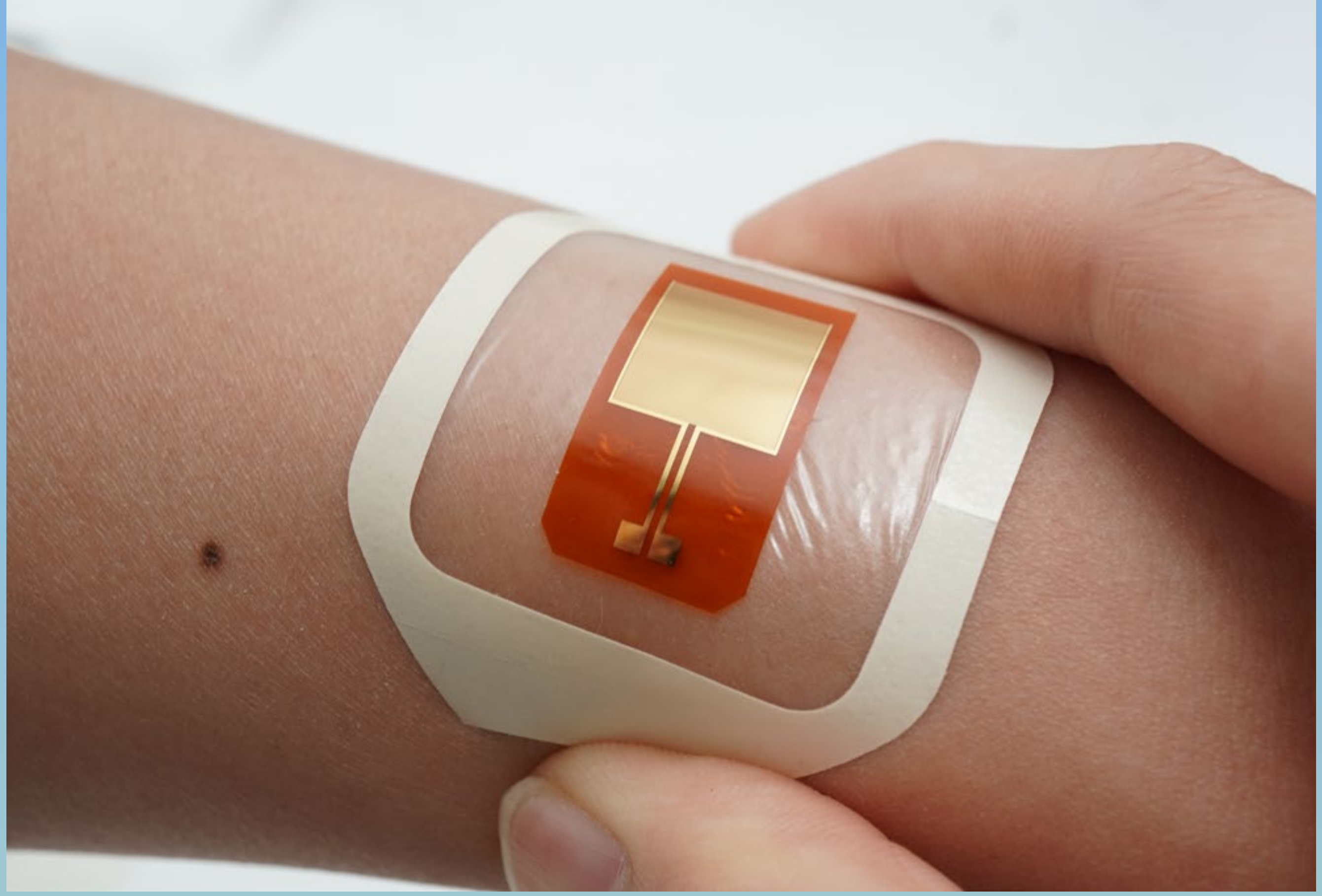
However, funding and research still tend to focus on nerve-related treatments, which leaves experts calling for more attention to the potential of electroceuticals to target other types of cells. Professor Vaughan Macefield of Monash University believes that the field could expand into broader areas, such as regenerative medicine and cell-based therapies.

Recent breakthroughs suggest that electroceuticals may go beyond treating nerves. Scientists are now exploring ways these devices could work directly with other cells in the body, like those in the skin or kidneys. For example, bioelectric bandages are being developed to interact with skin cells, encouraging faster healing by triggering certain cellular responses. Professor Michael Levin at Tufts University is researching ways to stimulate wound healing with these bandages.

Another promising development comes from a Swiss bioengineer, Martin Fussenegger, and his team, who are creating a “synthetic pancreas” device for diabetic mice. This wearable tech senses when the body needs insulin and releases it on demand through electrical signals. Although still in early testing, this technology could one day change how diabetes and other chronic conditions are managed.



Bioelectronic Localized Antimicrobial Stimulation Therapy (Blast)



In a different medical field, a team of researchers led by Bozhi Tian at the University of Chicago have created the Bioelectronic Localized Antimicrobial Stimulation Therapy (Blast) skin patch, which uses small electric currents to fight bacteria on wounds. This kind of innovation is especially important as more infections become resistant to antibiotics.

Why it's interesting

This emerging technology could help people take control of their health in new ways, especially for managing long-term health issues, with more personalized treatments that help manage complex conditions more effectively. For brands, it opens up opportunities to offer innovative products that bridge traditional healthcare and modern tech.

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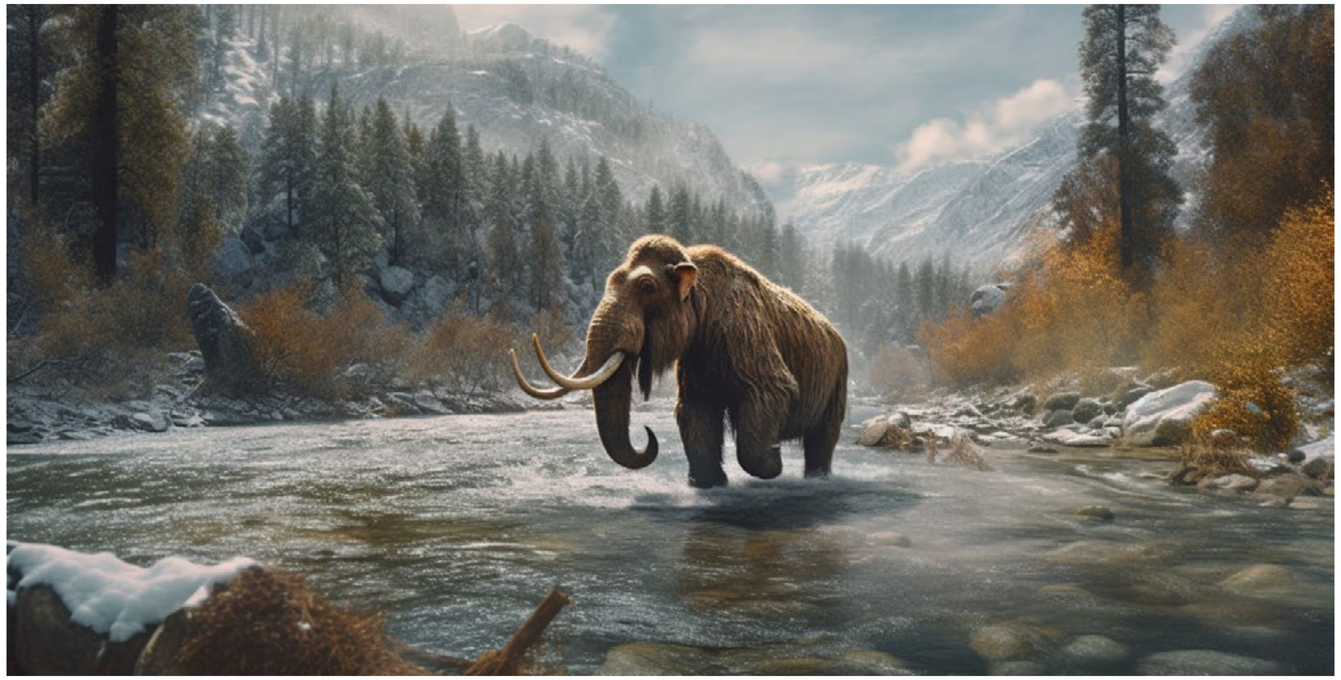
THE BIODIVERSITY ECONOMY

A biodiversity economy could emerge in the next decade.

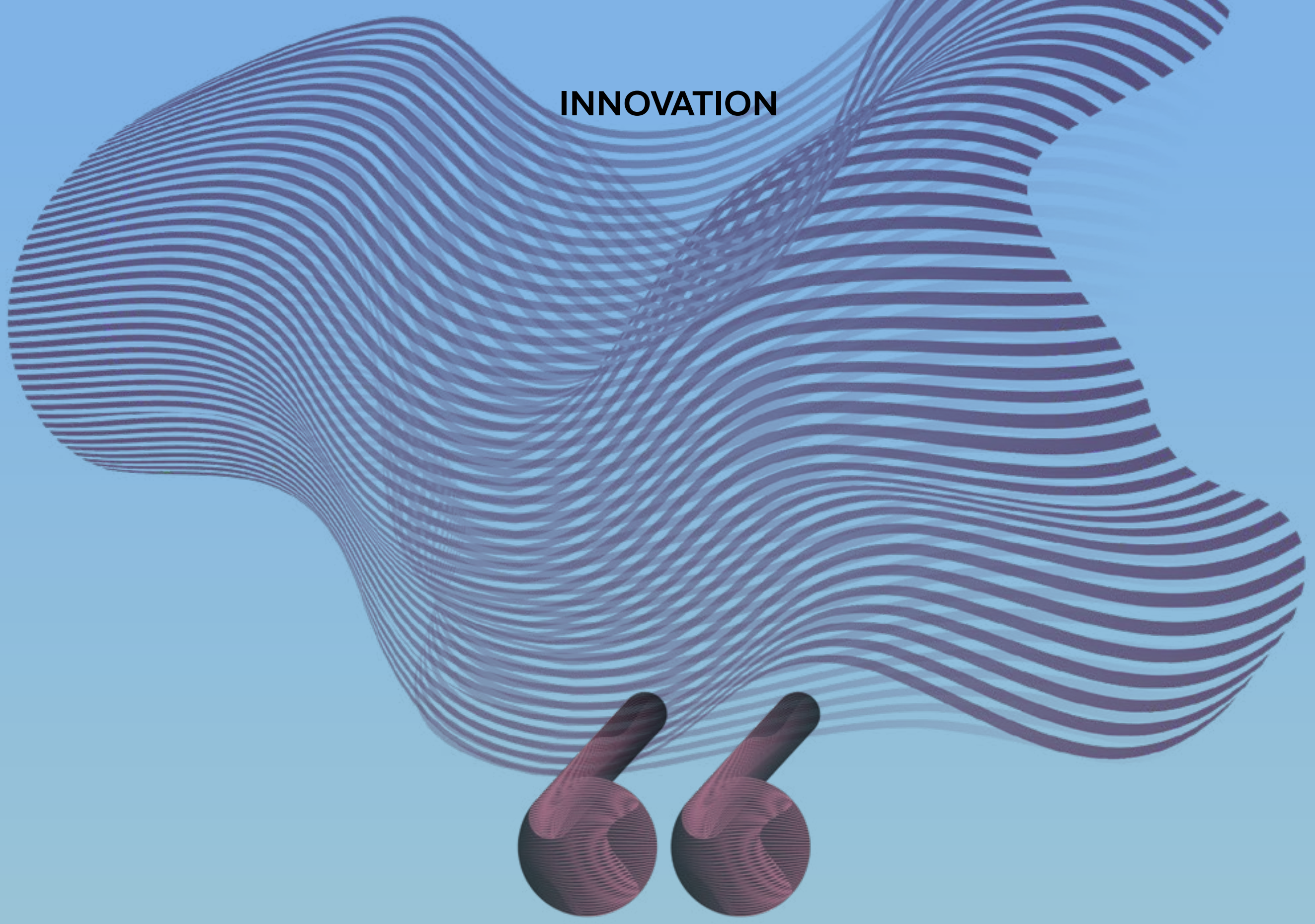


In the future a new economy will emerge, centered on the value of protecting certain animals because of the positive contribution they make towards ecosystem health.

At a fireside chat for SXSW 2024, Austin entrepreneur Benjamin Lamm, cofounder and CEO of synthetic biology tech company Colossal Biosciences, said, "The biodiversity economy will be here in the next 10 years." He describes it as putting "a value on protecting animals", adding, "people will see the ecological impact if we protect these animals, and I think that's quantifiable."

Colossal Biosciences, the company Lamm founded with geneticist George Church, is working on a "de-extinction" moonshot that aims to engineer and rewild hybrid species that share the traits of extinct and endangered animals, including woolly mammoths, for their ability to maintain healthy ecosystems and help sequester carbon. A 2024 study by Yale University

Colossal Biosciences



THE BIODIVERSITY ECONOMY WILL BE HERE IN THE NEXT 10 YEARS.

Benjamin Lamm, cofounder and CEO, Colossal Biosciences

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(yet to be peer-reviewed), demonstrated the effect: when 170 European bison were introduced to grassland in the Tarcu mountains of Romania, carbon capture increased by a factor of 10.

Lamm is not the only voice calling for the new approach. Ian Redmond, head of conservation at non-profit streaming platform Ecoflix and the cofounder of Rebalance Earth, told *Wired* in 2024 that we should be valuing the work that animals, birds, and natural ecosystems do for us, like seed dispersal, tree planting, and carbon sequestration, services that he estimates are worth $700 billion annually.

Others call nature a joint stakeholder. Commenting on the January 2025 wildfires in Los Angeles, John Vaillant, the author of *Fire Weather*, told the *Guardian*, "I don't care what business you're in, nature owns 51% of it, at least. We act as if we own it. We share it."

Why it's interesting

Some businesses are already investing in supporting habitats and regenerating biodiversity, but this concept is in its infancy. A formalized economy could pave the way for more projects that support rewilding animals and spur the maturity of the biodiversity credits market.

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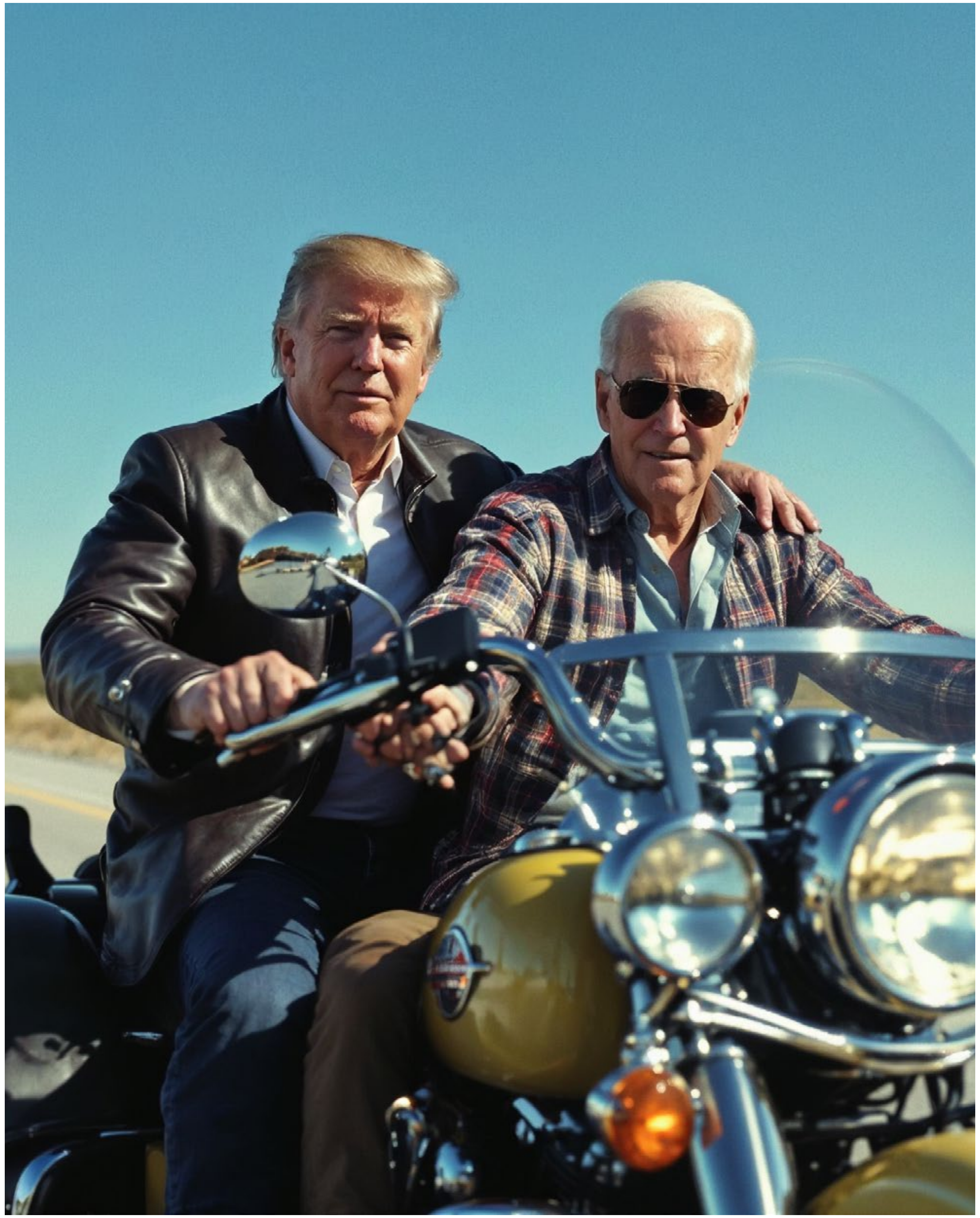
WORLD-CONJURING TECH

Technology will allow us to cocreate realities.



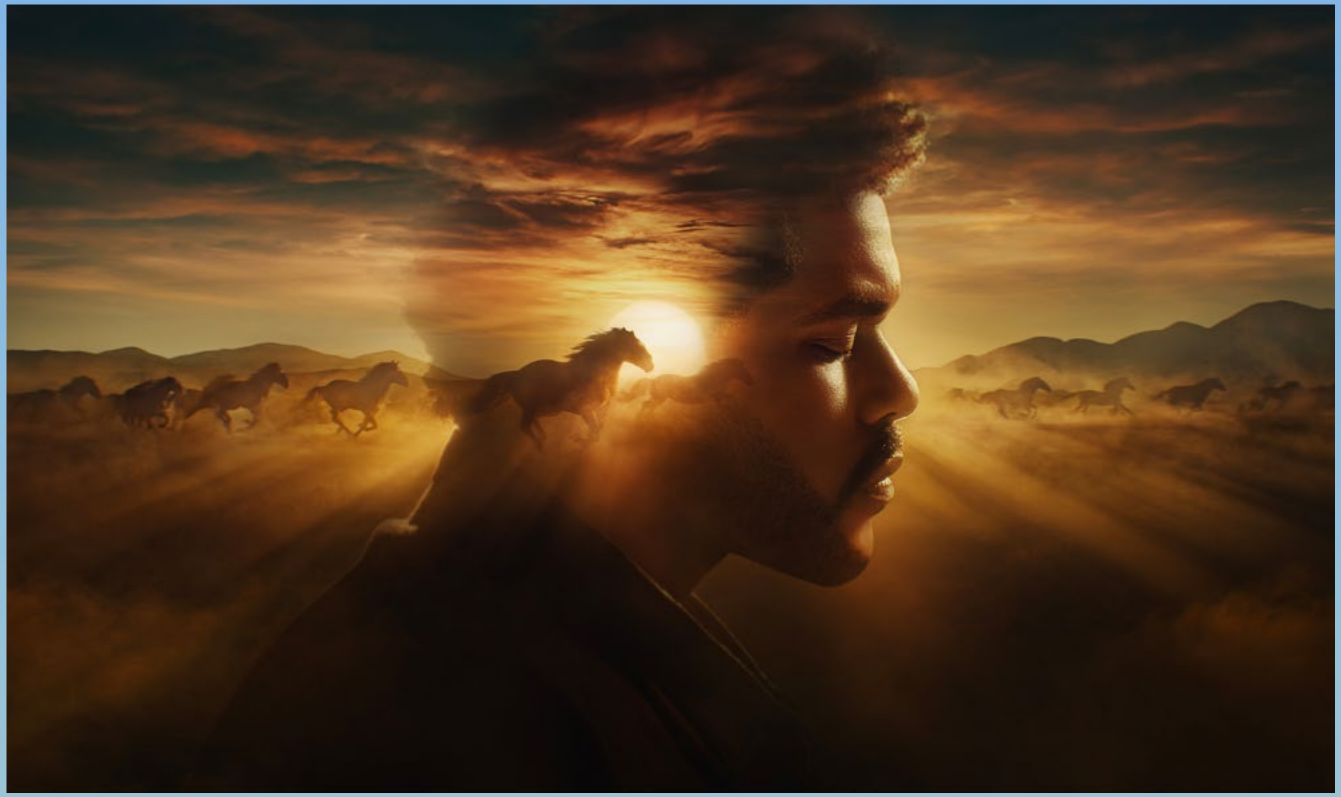
“Why can’t we be friends?” by Ari Kuschnir. Courtesy of the artist

"Humanity is collectively awakening into the realization that we cocreate reality," says Neil Redding, a near futurist and innovation architect. In an interview with VML Intelligence he describes the shift as "something like a lucid dream in our waking consciousness." (For more on summoning the creative subconscious, see Dream tourism, page 198.)

It may sound abstract, but from the political arena to the shifting narratives of history, we each curate our own version of the truth. Beauty? Subjective. Music? A matter of taste. Our literal perceptions of the world differ, right down to *that* dress that broke the internet. The truth is reality has always been subjective, but now? It's a choose-your-own-adventure.

The great "unlock" as Redding calls it, lies in the convergence and acceleration in spatial computing, accessible tools for creation, and AI. This growing convergence will open new ways for us to participate in the digital realms we've been building, says Redding, "making everything more malleable, more interactive and connected, more relational. In other words, a reality we can influence and even create with the power of our collaborative intention."

As Redding explains, three key innovations are now converging. People now have access to pro-grade, AI-enabled, synthetic media tools that allow anyone to be a storyteller. Redding points to photorealistic software like Runway and X's Grok AI, which can generate video and visual effects in moments. He cites artist and storyteller Ari Kuschnir, whose AI-generated films of parallel realities (Donald Trump undergoing a psychedelic-induced awakening, going on a buddy road trip with Joe Biden) have gone viral.



The Weeknd "Open Hearts" immersive experience for Vision Pro, Apple

In tandem, spatial computing devices such as the Apple Vision Pro (covered in "The Future 100: 2024") use camera and display technology that allow us to be transported and feel collective presence in both physical and digital realities. Apple is building a pipeline of "wow" content to attract users, including an *Inception*-like immersive music experience for The Weeknd's "Open Hearts." The Vision Pro is priced at $3,499 and sales have been muted (around 350,000 units), but Omdia predicts they will build to 750,000 in 2025 and 1.7 million in 2026. More launches are on the way to drive adoption. Tech journos are impressed with XReal's One Series, which launched in December 2024, and Meta's prototype Orion glasses should arrive 2027. Even smart contact lenses are back, showcased at MWC by UAE startup Xpanceo. (See Smart glasses 2.0, page 60, for more.)

Smart contact lenses, Xpanceo

With AI agents that can perform tasks and act autonomously as our collaborators (predicted by OpenAI to go mainstream in 2025), we gain the ability to create, manage, and personalize our own worlds on the fly, or "speak them into reality" as Redding puts it. "Humans will start to truly experience cocreating realities with technology, as well as with each other," he says.

A tangible example comes from Snap, which is adding generative AI prompts to Lens Studio 5.0 that will allow creators to create 3D AR assets and experiences using text and voice prompts.

The same technology will also transform storytelling, making it more interactive and personalized, pointing to opportunities for brands and businesses alike. Signaling its intent to take advantage, Disney has announced the formation of an Office of Technology Enablement to coordinate its push into AI and mixed-reality experiences.

MIT Technology Review notes that AI startups such as Inworld are already working on unscripted non-playable characters (NPCs) who never repeat themselves, and researchers at Google and Tel Aviv University have created a version of *Doom* that runs through generative AI, pointing to the potential for infinite, personalized, and ever changing narratives for games and even movies.

At SXSW 2024 the winner of the XR Experience jury prize shows this principle in action. *The Golden Key* by Marc Da Costa and Matthew Niederhauser depicts an infinite fairytale unfolding across three giant screens, generated by an AI trained on a global dataset of tales and myths. Audience members are invited to shape and personalize the narrative by introducing their own characters and story elements.

Why it's interesting

Thanks to spatial computing and AI, reality is in our hands, says Redding, giving us "the tools to precisely design and architect experiences that 'real-ize' whatever we can imagine." Brands will be empowered to create active, participatory experiences that resonate with consumers on a deeper level, ultimately shaping shared realities.

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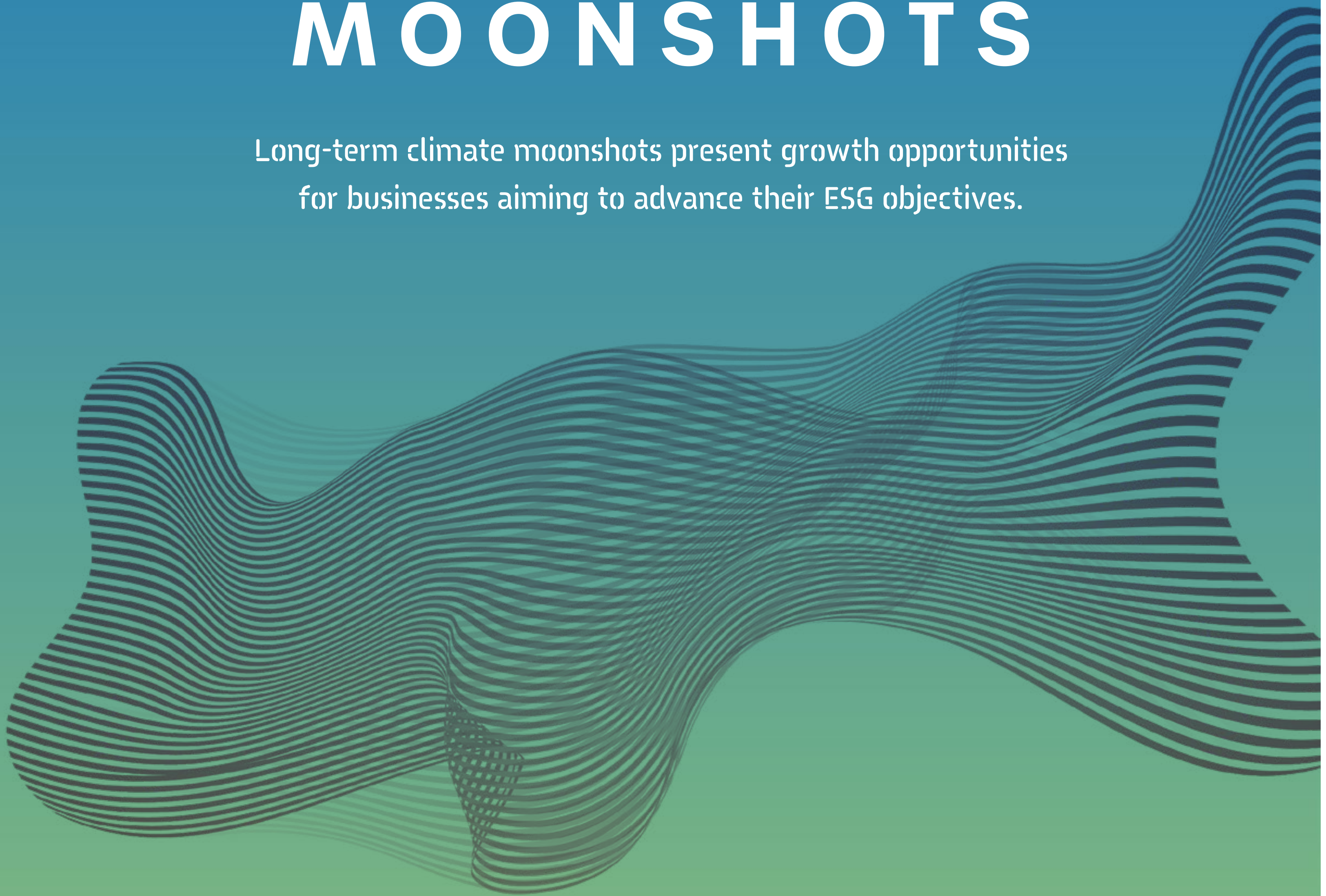
CLIMATE MOONSHOTS

Long-term climate moonshots present growth opportunities for businesses aiming to advance their ESG objectives.



Global temperatures continue to rise. In January 2025, the EU's Copernicus Earth observation programme reported that the world had exceeded 1.5 degrees of warming above preindustrial levels for the first time in 2024. Scientists have linked this increase to extreme weather events, including wildfires and hurricanes in the United States and Asia, and severe flooding in Europe. Many experts believe that simply curbing our emissions may not be enough.

Moonshots are ambitious, high-risk projects that demand long-term investment, research, and technological breakthroughs but could hold the transformational potential needed to solve complex global challenges like the climate issue. Here are three moonshots that could dramatically transform agriculture and energy and help mitigate the dangers of sea level rises.

Glacier preservation

Thwaites is a critically important glacier in west Antarctica, about the size of Florida or Great Britain. It is sometimes called the Doomsday glacier for the potential impact on global sea levels should it ever collapse. Glaciologists are considering bold interventions to preserve the fragile ice sheet. One idea is an "ice preservation scheme," which involves drilling boreholes to drain water from underneath the glacier to create a cooling feedback loop, which would theoretically help to dry and freeze the ice shelf in place. Another proposal suggests pumping out heat rather than water, using heat siphons in the boreholes.

Climate adaptive farming

Nobel Prize winner Jennifer Doudna, who helped to invent the CRISPR gene-editing tool, predicts "a coming revolution" that will see that technology breed animals and crops that are well adapted to the world's challenging climate, according to *MIT Technology Review*. Some of the ways in which the tool can help include creating crops with greater tolerance for adverse weather, such as rice that can survive drought, or corn plants that can withstand storms. It will also help to breed animals that are better able to cope with heat stress, such cattle with shorter coats. Research is also underway to modify cattle's gut microbes to reduce their potent emissions of methane, a greenhouse gas.

Clean fusion

Around 50 startups are working to commercialize clean fusion energy, a type of nuclear fusion that could potentially produce an unlimited supply of clean energy, with no harmful radiation. If one of them is successful, it could provide the answer to the world's energy needs, providing affordable clean energy solutions at scale. One important challenge relates to "net energy gain," where the technology releases more energy than is input, and scientists have so far managed to prove the concept on several occasions. One startup, Pacific Fusion, which is backed by Silicon Valley firms linked to Bill Gates and Eric Schmidt, says it will have a full-scale demonstration system within the next decade, reaching commercial potential by the mid-2030s.

Why it's interesting

As many businesses dial back their commitments on climate, long-term moonshots present opportunity. Investing contributes to ESG commitments, aligns with stakeholder and customer expectations, and positions those who do so as leaders of a resilient future.

Thwaites Glacier, Paul Summers via Unsplash

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QUANTUM UTILITY

Quantum computing is poised to deliver on its hype.

advantage
advantage
D:WAVE

D-Wave Advantage system. Courtesy of D-Wave

Quantum computing is still maturing, but it has huge potential to solve challenges and the time to start exploring it is now. “If the 2020s are the intelligence decade, then the 2030s will be the quantum decade,” Brian Comiskey, Consumer Technology Association futurist, predicted at CES 2025.

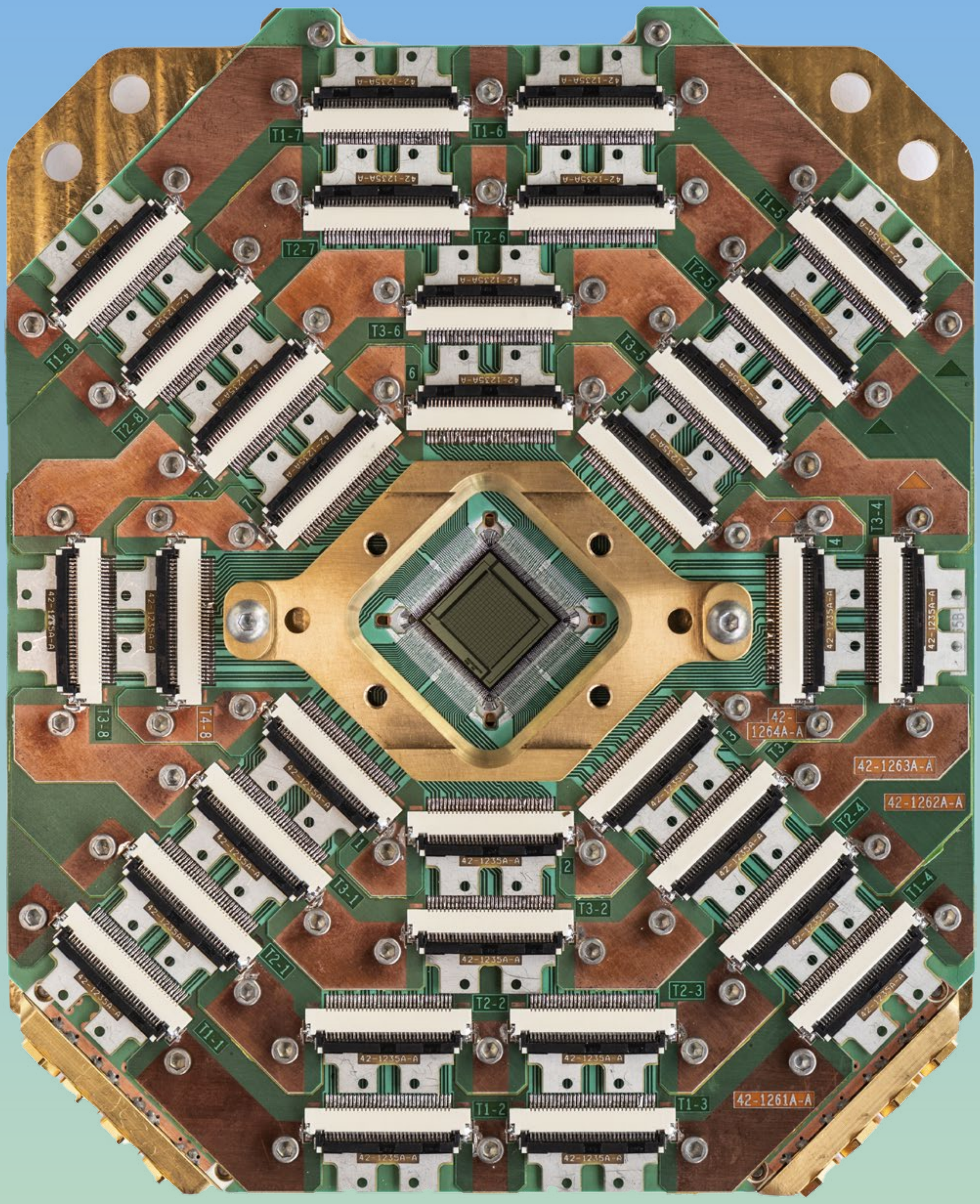
Quantum is a mind-bending field for non-specialists, involving concepts that seem to defy reality. To understand its potential, VML Intelligence spoke to Murray Thom, vice president of quantum technology evangelism at D-Wave, a leader in the field alongside IBM, Google, Microsoft, and numerous others.

Thom describes quantum as “a computer that can use quantum effects to accelerate calculations. So that means that we can start to think about

> **IF THE 2020S ARE THE INTELLIGENCE DECADE, THEN THE 2030S WILL BE THE QUANTUM DECADE.**
>
> Brian Comiskey, futurist, Consumer Technology Association

quantum effects as a resource for a computer that can be used in different ways." Giving a sense of the advantages of quantum over classical computing, Thom says, "we've done a demonstration of calculations in 20 minutes that will take a supercomputer more than a million years to do."

Quantum might sound futuristic—and it is—but it's already being used commercially. D-Wave is developing two models it categorizes as "evolutionary" and "revolutionary." Thom explains, "In one model, we use quantum effects to allow the computer to move between solutions more quickly. That's really important for optimization applications like workforce scheduling, vehicle logistics, and production scheduling, and those applications are near term." D-Wave clients are already using quantum to solve optimization problems in areas like logistics, last-mile delivery, and customer loyalty programs.

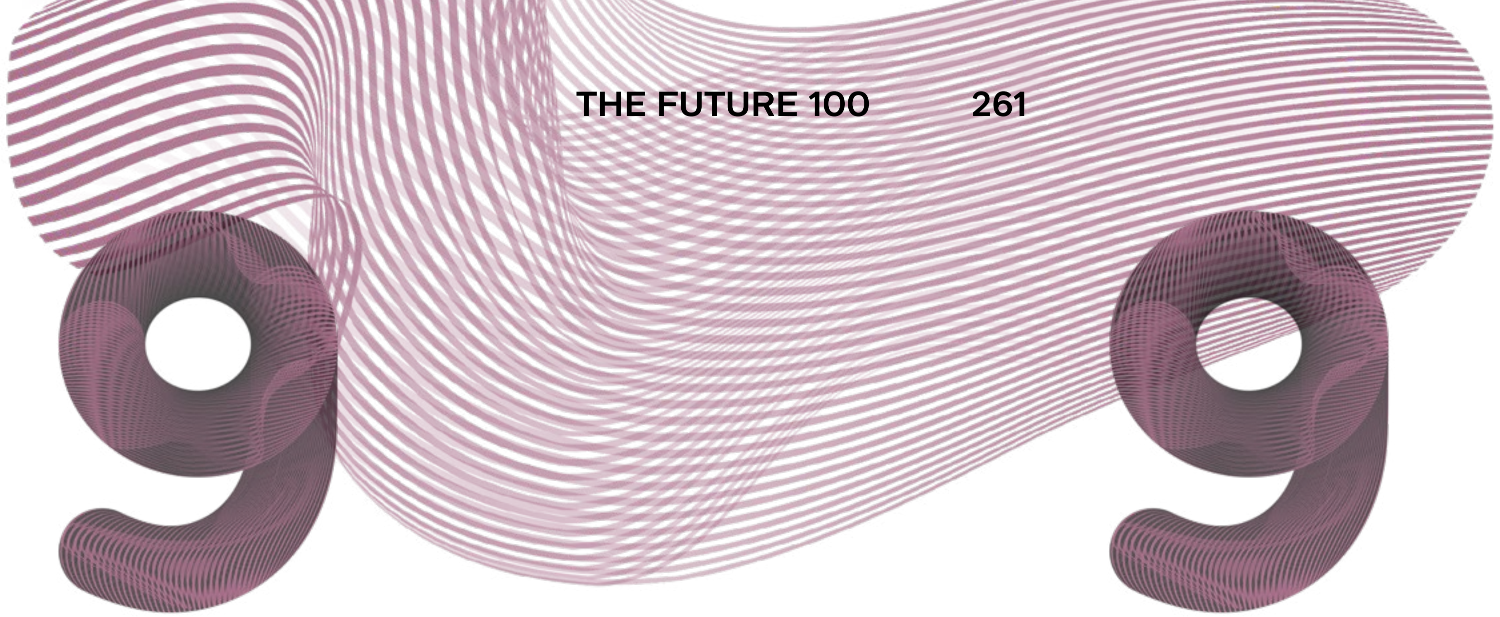


D-Wave Advantage quantum processing unit. Courtesy of D-Wave

For the “revolutionary” model of quantum computing, Thom says, “you're using quantum effects to allow the computer to store more information. It's very powerful, but it's also quite delicate, so those applications are a little bit further out, but they're worth developing because they're revolutionary, like being able to accelerate drug discovery.”

This future model of quantum is still in development and faces challenges such as susceptibility to disturbances like electromagnetic noise, heat, and even cosmic rays. While widespread commercial utility is still some years off, the field is gaining momentum. Professor Sabrina Maniscalco, who researches the impact of noise on calculations at the University of Helsinki, told *MIT Technology Review* in 2024, “I’m actually quite confident about the fact that we will be entering the quantum utility era very soon.” Investment is growing too, led by national governments. Optica reports that at least nine countries have invested more than $1 billion in funding so far and in November 2024 the US Senate proposed increasing its investment in quantum research and development to $2.5 billion over five years.

Several companies are already exploring quantum. Alberto Prado, Unilever’s global head of R&D digital and partnerships, speaking at the AI Summit London in 2024, predicts it will be at least three to five years before quantum delivers widespread commercial utility. For now, the company is looking to identify the use cases where it could deliver an advantage, such as in accelerating product development. Prado says that simulations using the technology could help identify and test new molecules for soaps and surfactants that could contribute to the company’s decarbonization efforts.



Energy company E.on is exploring the use of quantum computers to optimize future decentralized energy grids—those we have today were built long before the concept of a decentralized model of generation—where buildings can produce and share energy back to the grid or elsewhere.

Another promising application for quantum computing is in drug discovery. The startup Qbio.ai is leveraging quantum technology to improve machine learning models that predict the structures of ribonucleic acid (RNA) molecules. A deeper understanding of RNA could spur the development of innovative RNA-based treatments, like those used in COVID-19 vaccines.

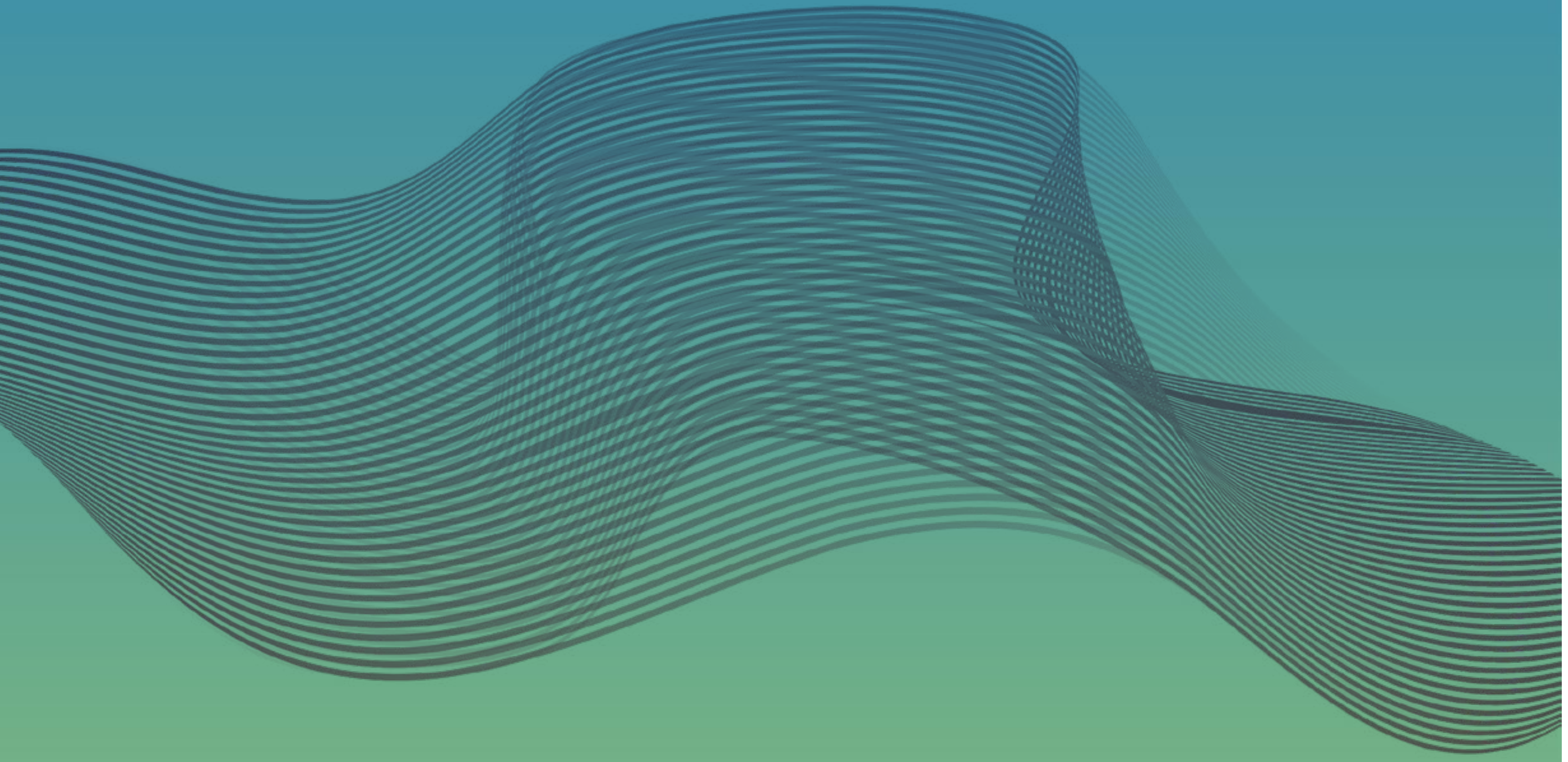
Why it’s interesting

Quantum is still nascent, but in the long term, the hype may be justified. BCG forecasts that it could deliver $450 billion to $850 billion of economic value by 2040. Companies in industries that require complex problem-solving, such as chemicals, pharmaceuticals, and finance, stand to benefit, but its ability to solve optimization problems has broad relevance across every sector.

100

SKINJUVENATION

Scientists are unraveling the secrets of aging.



OneSkin

Better scientific understanding of human skin could one day lead to treatments and protocols to slow aging. An international team of scientists based at the Wellcome Sanger Institute in Cambridge in the United Kingdom made a groundbreaking discovery about how the human body creates skin from stem cells and has even managed to grow skin from stem cells in the laboratory. The project is part of the Human Cell Atlas project, which aims to understand how the body is made down to the smallest cell. As well as combating aging, the findings could also be used to produce artificial skin for transplantation and prevent scarring, according to scientists.

> BRANDS IN THE HEALTH AND WELLNESS SPACE SHOULD PREPARE FOR A FUTURE IN WHICH SKINCARE IS MORE INTEGRATED WITH LONGEVITY.

The pursuit of firm, wrinkle-free skin could be more than just vanity. Wrinkles are customarily seen as a sign of aging, but could they also be a cause of it? Research has shown that what happens on the surface of the skin can have an impact inside the body. Factors such as oxidative stress, inflammation, and glycation damage both skin and internal organs, contributing to age-related decline. Two teams of scientists in Portugal in 2023 published findings that linked “senescent” cells—sometimes called zombie cells, which accumulate along with age and secrete harmful chemicals—with accelerated aging of organs in the body, in particular the brain. The teams, from the Center for Neuroscience and Cell Biology at the University of Coimbra (UC) and the UC faculty of pharmacy, studied the effects of senescent cells in mice. It is hoped that the discovery could lead to innovation to slow the aging process, potentially by eliminating or neutralizing the cells.

As for the skin itself, some startups are already exploring the potential for rejuvenation. Female-founded startup OneSkin, based in California, is developing topical anti-senescence skincare products that work at the molecular level. The company has patented a peptide ingredient called OS-01 that is said to ward off senescent cells and rejuvenate skin from the inside out, reversing its biological age. In November 2024, the company secured $20 million in Series A funding aimed at accelerating growth.

At the Consumer Electronics Show 2025, L’Oréal launched the Cell BioPrint, a device offering personalized and detailed skin analysis in just five minutes. The Cell BioPrint can calculate how fast skin is aging based on protein composition in the body, and then advise on what products and care is required to aid skin health. The product will pilot in Asia later in 2025.

Skin that is less aged has been correlated with longevity and better health, but more research is needed into whether reversing skin aging can also help to reverse overall aging. For now, at least, it’s one more good reason to invest in a good SPF (see Suncare’s skinification, page 153).

Why it’s interesting

As scientific understanding of the skin evolves, brands in the health and wellness space should prepare for a future in which skincare is more integrated with longevity. Skincare will no longer just be about beauty, but also a reflection and driver of overall health.

EXPERT VIEW 2025

A panel of more than 60 global experts helped to shape our 2025 trends. Here we ask some of our contributors for their predictions for the year ahead and their advice for brands.

THE ECONOMY

MEG ELKINS

SENIOR LECTURER AND BEHAVIORAL ECONOMIST, SCHOOL OF ECONOMICS, FINANCE AND MARKETING, RMIT UNIVERSITY

What's next for the economy and how do you see the impact of the US elections?

"We're in an extended emotional period. There's burnout and disengagement every now and again, and it's cycling up and down. There's a push-pull happening. The next stage for me is post-trauma—a time for growth. It's perhaps those areas around personal growth that will help us get back to equilibrium. Health spending is one area that I think will increase.

"The Brookings Institute predicts a 7-9% US inflation rate [in 2025]. That's great for government and local manufacturers but consumers will be paying more—that impacts the dollar, which has global repercussions. If there's no free trade, then you'll see tariffs being going both ways and that inflates prices. We've never had an administration like this. It's like a science experiment. In truth, how bad or good it's going to be is not completely determined. We have our models, and we have our predictions, but we're going to find out."

BRANDS & AUDIENCES

JO HEMMINGS

BEHAVIORAL PSYCHOLOGIST AND RELATIONSHIP COACH

How should brands best engage audiences in 2025?

"It's an overwhelming world. I think brands have got to keep the message very simple and focus on core values. Don't overload the audience with unnecessary or technical information. They need clear, consistent messaging. The customer journey needs to be streamlined. Make it intuitive and interactive, make people feel part of it. It needs visual clarity, purposeful aesthetics, sustainability—all the things to encourage a calm and mindful process. Brands think that bombarding people is the way to get an adrenaline rush to trigger purchase, but I think the way forward is a more nurturing process. I call it the Scandi approach: beautiful presentation, something that warms you and you feel you can relate to."

AI & LONGEVITY

BILL KOLE

JOURNALIST AND AUTHOR

What's on the horizon for longevity?
"An aging society will put an unprecedented strain on our social security systems. But there's a flip side, and that is if more of us are living to 100, we're going to be purchasing more goods and services for a longer period. That cohort will form a collective economic engine that will pour billions into our economy. Are aging people a brake or an engine? We're not sure yet, but maybe both.

"I do think the question of artificial intelligence is one that is a bit existential. There are a lot of people working on it right now to figure out what role it will play, because it will have an integral role to play in our longer lives, and that feels like something transcendent. I think a lot of minds will be looking at that in the new year, and the years beyond, to try and figure out: have we opened Pandora's box, or can we really use this to great effect to accentuate our lives and solve a lot of our problems?"

AI & CREATIVITY

ALI HOSSAINI

ARTIST, ENGINEER, AND PHILOSOPHER

What are you looking forward to in 2025?
"I'm going to have serious fun! AI makes artistic play so much easier. I guess you could call it experimentation, and I won't disagree with anyone who does, but, even as a digital artist, I do things more or less by hand. Making art is hard: you start with a concept, but realizing your imagination takes craft, care, and self-curation. In 2025, I'm going to run free and project lots of silly ideas into media artifacts—passable to friends and family, not the public.

"On a serious note, I look forward to developing tools and regulations that help society deal with the disruptive forces of AI. We think of creativity as positive, but let's remember that deepfakes are also creative. The same tools developed to manage transition in the arts can also be used to help people distinguish fact from fiction in social and political arenas."

COMMUNITY

MONIKA JIANG

WRITER, FACILITATOR, COMMUNITY BUILDER, AND FOUNDER OF SHARING OUR LONELINESS

What are you excited for in 2025?

“I’m excited because I feel this is just the beginning of the conversation [about loneliness]. I hope for more conversations with people who have the willingness and the hunger for having them; for opening up, for sharing, and really holding that as a communal space. I want to explore different cultural contexts that go beyond the modern Western culture view: branching across other communities, learning from them, learning from traditions, ancient rituals, people that are still very much in touch with those very simple but meaningful ways of connecting. Then fostering connections between all of us who are working on these issues across the loneliness, connection, community realm, and also seeing what’s happening in cities and urban environments, and what's happening in the pro-democracy space—what are activists doing? What is happening in sustainability? What is happening in the healing space, or mindfulness? Everybody who’s currently working to bring us closer to ourselves and each other and everything that is around us.”

TRUST & PRIVACY

SEAN PILLOT DE CHENECEY

AUTHOR AND CONSULTANT

What do you expect to see in 2025?

“One of the key things that’s coming through, certainly on a governmental level, is the notion of protecting privacy. I think privacy was hammered as social media networks really got going, when people either weren’t interested in privacy or didn’t understand the implications of digitally undermined privacy. We’re now seeing, on a governmental level, legislation being put in to really protect us in terms of our individual privacy—parameters being put around AI and guard rails and guidelines being put in. Now we’re beginning to see enough people who understand the potential real dystopian negativity of this waking up and putting guard rails in place on the other side of the argument.”

HOPE & OPTIMISM

DANI REYES

PSYCHOMETRICIAN, RESEARCHER, AND TEDX SPEAKER

What are you looking forward to in 2025?
"If anything, I think that what's representative about gen Z now is this unwavering optimism that a lot of us have. That comes off as weird to certain people, because it's like, why be optimistic now in these times, where everything seems to be falling apart?

"I am looking forward to things getting better. Because how can they not get better? It's always gotten better. I feel that I have a 100% survival rate so far, and so I will hold on to that."

THE QUANTUM ERA

MURRAY THOM

VP OF QUANTUM TECHNOLOGY EVANGELISM, D-WAVE

What is the current and future potential of quantum computing?
"Quantum computing is an emerging but also rapidly growing technology sector. IDC predicts it will reach $8 billion in less than four years. Quantum is actually here, and you can start using it to optimize your operations today on real-world business decisions with constraints that are part of every business. In one case, D-Wave has helped a customer with a process that was taking weeks to get that down to under an hour. Longer term, seven to 15 years away, there will be revolutionary applications, like being able to accelerate drug development.

Quantum computing can be used as a compute engine within people's artificial intelligence workflows. If we can take these really challenging artificial intelligence workflows, which are hard for high-performance computing systems, and put them onto quantum computers, we have the opportunity to dramatically reduce the power consumption of those workflows."

In addition, we would like to thank all the expert contributors whose insights helped to shape this year's trends:

Robin Bartlett, cofounder, Sea Scrub Sauna
Nahid de Belgeonne, somatic wellness practitioner and author of *Soothe*
Isabel Berwick, journalist and host of the *Financial Times' Working It* podcast
Dr Bochuan, lead research scientist, OWH
Jon Carney, CEO, Warm Storm
Tom Chatfield, technology theorist and author of *Wise Animals: How Technology Has Made Us What We Are*
André Chiang, Michelin-starred chef and founder of Raw culinary academy
Jonathan Chinen, founder, Dot.me
Byron Chong, general manager, MGM Shanghai West Bund
Elizabeth Connelly, energy technology and transport analyst, International Energy Agency
Jemma Conner, research manager, YouGov
Christian David, founder, Kure Bazaar
Anna DeSimone, author of *Welcome to the Agrihood*
Anton Diaz, director, Mamonaku Kohi
Pascal Dombis, artist
Anthony Engi Meacock, architect and founding member, Assemble
Hillary Flur, cofounder, Folly Collection
Cindy Gallop, former advertising executive and consultant
Brian Grover, founder, Fox Point Farms
Cory Han, brand communication senior manager, 3CE
Graham Harris, founding partner and managing director, SHH Architecture and Interior Design
Warren Hatch, CEO, Good Judgment
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Haley Houseman, creative director, Sanctuary
Dan Howarth, design and travel writer
Hussein Kanji, founder, Hoxton Ventures
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Søren Leth, cofounder, Sleth
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Torquil McIntosh, cofounder, Sybarite
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Sarah Morley, CEO, Via
Ben Murnane, author of *Transhuman Citizen: Zoltan Istvan's Hunt for Immortality*
Tatsuya Nishinaga, founder, Teki Design
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ACKNOWLEDGEMENTS

We would like to thank the following VML colleagues for their valued input and support:

Faysal Abdul Malak
Penny Bamfo
Sakila Banyen
Pinaki Bhattacharya
Virgile Brodziak
Laura Conti
Ruby Crilly
Rachel Hogan
Hiroyuki Hosomi
Katja Järventaka

Joyce Ling
Jill Manester
Sebastian Martínez
Maria Paxton
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JJ Schmuckler
Lizzie Snell
Lydia Tamarat
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ABOUT VML INTELLIGENCE

VML Intelligence is VML's futurism, research, and innovation unit. It charts emerging and future global trends, consumer change, and innovation patterns—translating these into insight for brands. VML Intelligence offers a suite of consultancy services, including bespoke trends presentations, futures reports, and workshops. It is also active in innovation, partnering with brands to activate future trends within their frameworks and execute new products and concepts. The division is led by Emma Chiu and Marie Stafford, Global Directors of VML Intelligence.

For more information visit:
vml.com/expertise/intelligence

About The Future 100

VML Intelligence's annual forecast presents a snapshot of the year ahead and identifies the most compelling trends to keep on the radar. The report charts 100 trends across 10 sectors, spanning culture, technology, travel and hospitality, brands and marketing, food and drink, beauty, retail, luxury, health, and innovation.

About the data in this report

Unless otherwise stated, all findings in this report were collected by SONAR™, VML's research practice, from September to November 2024. The study fielded September 27–November 5, 2024, when we surveyed 13,961 adults across 14 markets (~1,000 participants per market). The markets covered in this research are Argentina, Australia, Brazil, China, Colombia, France, India, Japan, Mexico, South Africa, Thailand, the United Arab Emirates, the United Kingdom, and the United States. Respondents are representative of their respective market in regard to age, gender, and income.

VML

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